IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

PATENT

Title:	Automated Self-Storage Reservation and Management System	Attorney Docket No. 12521-018 (formerly 57111-5104)	
Inventor(s):	Shoen et al.	Examiner:	Saliard, Shannon S.
Serial No.:	10/087,193	Group Art Unit:	3628
		Conf. No.:	8644
Filing Date:	February 28, 2002		

APPLICANT'S DECLARATION UNDER 37 C.F.R. § 1.131

I, Bruce Royer, declare as follows:

1. I am an inventor of the subject matter described and claimed in United States Patent Application Serial No. 10/087,193, filed February 28, 2002, entitled Automated Self-Storage Reservation and Management System; the subject matter is disclosed and claimed in the above-referenced patent application.

2. The completion of invention of the subject matter of the above-referenced application in the United States is at least as early as June 22, 2001. To establish completion of invention of the subject matter of the above-referenced application in the United States, the following attached document is submitted as evidence: a user manual with a computer print date stamp of June 22, 2001 (hereinafter "Evidence" and referred to as pages E-1, E-2, E-3...). The completion of invention of the subject matter of the above-referenced application in the United States is at least as early as June 22, 2001 based on the Evidence. The Evidence includes written text and figures describing subject matter disclosed and claimed in the above-referenced patent application.

3. In order to establish that the invention of the subject matter of the above-referenced application was sufficiently tested to demonstrate that it worked for its intended purpose at least as early as June 22, 2001, I am now submitting this Declaration. The assignee of the above-referenced application (U-Haul International) experienced some loss of computer data around Memorial Day 2003. Due to this loss of data, I am submitting this Declaration to evidence that the invention of pending claims 1, 2, 6-25, and 30 of the above-referenced application and each of such claims was sufficiently tested to demonstrate that it worked for its intended purpose at least as early as June 22, 2001.

[DECLARATION CONTINUES ON FOLLOWING PAGES]

4. The assignee of the above-referenced application (U-Haul International) implemented the system of pending claim 1 (and claims 13-15, and 17-19, which variously depend from claim 1) of the above-referenced application on a server at a U-Haul International location in Phoenix, Arizona on a date at least as early as June 22, 2001, and the system of this pending claim 1 (and claims 13-15, and 17-19, which variously depend from claim 1) was sufficiently tested to demonstrate that it worked for its intended purpose at least as early as June 22, 2001, including:

an automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

a business network of a plurality of self-storage facilities, wherein the user is personnel of each self-storage facility and uses the business network to access inventory information and customer information of the plurality of self-storage facilities to generate reports for managing the operation of each self-storage facility; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

a server having a room inventory database and accessible to the user via a computer-terminal coupled to the server, wherein the user inputs the inventory information into the room inventory database via the computer-terminal and an inventory information capture and the user accesses the inventory information pertaining to self-storage units located in the plurality of self-storage facilities of the business network; [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

the server accessible to the user via the computer-terminal coupled to the server, wherein the user inputs the customer information into the server via the computer-terminal and a customer information capture and the user accesses the customer information pertaining to customers of the plurality of self-storage facilities of the business network; and [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

the server having a reporting feature in communication with the inventory information capture and the customer information capture and accessible to the user via the computer-terminal coupled to the server,

via the reporting feature, wherein the user extracts and analyzes the inventory information from the room inventory database pertaining to self-storage units located in the plurality of self-storage facilities of the business network,

via the reporting feature, wherein the user extracts and analyzes the customer information from the server, and

via the reporting feature, wherein the user generates reports using the analysis of the inventory information and the customer information for managing the operation of the storage facility, including reports for revenue, unit availability, reservations, open contracts, rent rolls and credit card information.

[See Evidence E-1, 7, 8, 11, 15, 17, 18, 30, 32, 46, 51, 169-198, 222, 224, 227, 232, 234, 239, 240, 242, 244, 249-252, 272, 274]

5. The assignee of the above-referenced application (U-Haul International) implemented the system of pending claim 2 (and claims 6-12, 16, and 20-25, which variously depend from claim 2) of the above-referenced application on a server at a U-Haul International location in Phoenix, Arizona on a date at least as early as June 22, 2001, and the system of this pending claim 2 (and claims 6-12, 16, and 20-25, which variously depend from claim 2) was sufficiently tested to demonstrate that it worked for its intended purpose at least as early as June 22, 2001, including:

an automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

a business network of a plurality of self-storage facilities, wherein the user is personnel of each self-storage facility and uses the business network to access inventory information and customer information of the plurality of self-storage facilities to generate reports for managing the operation of each self-storage facility; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

a server having a room inventory database and accessible to the user via a computer-terminal coupled to the server, wherein the user inputs the inventory information into the room inventory database via the computer-terminal and an inventory information capture and the user accesses the inventory information pertaining to self-storage units located in the plurality of self-storage facilities of the business network; [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

the server accessible to the user via the computer-terminal coupled to the server, wherein the user inputs the customer information into the server via the computer-terminal and a customer information capture and the user accesses the customer information pertaining to customers of the plurality of self-storage facilities of the business network; [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

wherein one or both of the inventory information capture and customer information capture include information for managing the operation of the plurality of self-storage facilities, including information on revenue, cash summaries, unit availability, facility utilization, reservations, open contracts, rent rolls and credit card information; and [See Evidence E-1, 7, 8, 11, 15, 17, 18, 30, 32, 46, 51, 169-198, 222, 224, 227, 232, 234, 239, 240, 242, 244, 249-252, 272, 274]

the server having a rental transaction feature in communication with the inventory information capture and customer information capture and accessible to the user via the computer-terminal coupled to the server,

via the rental transaction feature, wherein the user creates a rental agreement using the inventory information and the customer information, and wherein the rental agreement involves a plurality of self-storage units.

[See Evidence E-8, 11, 16-18, 31-33, 39, 44, 46-48, 50, 55-63, 65, 68-71, 73, 76, 77, 82, 93, 94, 98, 101, 105-109, 111, 115-117, 119, 123, 126, 127, 133-137, 139, 141, 142, 145-

152, 154, 156-160, 168, 171, 174, 177-181, 183, 186-189, 192, 193, 195, 196, 205, 208, 209-212, 226, 234, 235, 237, 244, 248, 249, 256, 258]

6. The assignee of the above-referenced application (U-Haul International) implemented the system of pending claim 30 of the above-referenced application on a server at a U-Haul International location in Phoenix, Arizona on a date at least as early as June 22, 2001, and the system of this pending claim 30 was sufficiently tested to demonstrate that it worked for its intended purpose at least as early as June 22, 2001, including:

an automated self-storage management system for enabling a user to conduct self-storage transactions, the system comprising:

a business network of a plurality of self-storage facilities, wherein the user is personnel of each self-storage facility and uses the business network to access inventory information and customer information of the plurality of self-storage facilities to generate reports for managing the operation of each self-storage facility; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

a server having a room inventory database and accessible to the user via a computer-terminal coupled to the server, wherein the user inputs the inventory information into the room inventory database via the computer-terminal and an inventory information capture and the user accesses the inventory information pertaining to self-storage units located in the plurality of self-storage facilities of the business network; [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

the server accessible to the user via the computer-terminal coupled to the server, wherein the user inputs the customer information into the server via the computer-terminal and a customer information capture and the user accesses the customer information pertaining to customers of the plurality of self-storage facilities of the business network; [See Evidence E-11, 12, 30, 34, 62, 114, 116, 185, 196, 197, 207, 208, 222, 226, 229-237, 254, 255, 295]; [See Evidence E-1, 6, 11, 15-18, 24, 29, 30, 33-38, 86, 94, 114, 140, 165, 166, 168, 196, 197, 205-208, 222, 226, 227, 229-37, 295]

the server having a rental transaction feature in communication with the inventory information capture and customer information capture and accessible to the user via the computer-terminal coupled to the server,

via the rental transaction feature, the user creates a rental agreement using the inventory information and the customer information, wherein the rental agreement involves a plurality of self-storage units, and

[See Evidence E-8, 11, 16-18, 31-33, 39, 44, 46-48, 50, 55-63, 65, 68-71, 73, 76, 77, 82, 93, 94, 98, 101, 105-109, 111, 115-117, 119, 123, 126, 127, 133-137, 139, 141, 142, 145-152, 154, 156-160, 168, 171, 174, 177-181, 183, 186-189, 192, 193, 195, 196, 205, 208, 209-212, 226, 234, 235, 237, 244, 248, 249, 256, 258]

the server having a reporting feature in communication with the inventory information capture and the customer information capture and accessible to the user via the computer-terminal coupled to the server,

via the reporting feature, wherein the user extracts and analyzes the inventory information from the room inventory database pertaining to self-storage units located in the plurality of self-storage facilities of the business network and extracts and analyzes the customer information from the server and generates reports using the analysis of the inventory information and the customer information for managing the operation of the storage facility, including reports for revenue, cash summaries, unit availability, facility utilization, reservations, open contracts, rent rolls and credit card information.

[See Evidence E-1, 7, 8, 11, 15, 17, 18, 30, 32, 46, 51, 169-198, 222, 224, 227, 232, 234, 239, 240, 242, 244, 249-252, 272, 274]

7. I have reviewed pending claims 1, 2, 6-25, and 30 of the above-referenced application and each of such claims was reduced to practice at least as early as June 22, 2001.

8. This declaration is submitted prior to final rejection.

9. All statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the above-referenced patent application or any patent issuing thereon.

Dated: 12-16-2010

Bruce Royer

Welcome to WebSelfStorage

Welcome to *WebSelfStorage*, an *Intranet* point-of-sale storage management system. This application enables you to provide fast and efficient customer service, as well as providing you with the tools necessary to effectively run your self-storage facility. Using *WebSelfStorage*, you can complete the following contracts:

Reservation quote

Confirmed reservation

Move in

Take payment

Move out

Transfer between rooms

View a contract.

With this version of *WebSelfStorage*, cash drawer balancing remains a function of BEST. *WebSelfStorage* provides a closing process that feeds transaction information to BEST® (Banking Electronic Summary Transactions).

In addition to contract processing, *WebSelfStorage* provides management tools that enable you to:

Control user sign-on

Assign rooms to an auction

Control room inventory walk around sequence

Create special customer notes

Create management reports

Complete nightly batch processing

Reprint nightly batch reports and letters

Review customer status

Reprint customer receipts.

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Contact Information

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press and hold down the ALT key and then press A to access the ADD page. Another visual help is in the wording on the key itself. Notice that the only capital letter is the hot key. Example: Next appears as neXt on the button. The 'X', in this case, is the hot key.

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BACK-GROUND COLORS

On some input pages, you will find several fields have a background color of blue or green.

- The blue background color means the field requires information before continuing. For example: the customer's first and last name are but two of several required input fields on the CUSTOMER INFORMATION page.
- The green background color means that at least one set requires input. For example: on the CUSTOMER INFORMATION page, you must type either the customer's social security number or other form of identification; or their driver's license information.

BUTTONS

Each page has a set of directional buttons that enable you to move from page to page, as well as performing special task within the page.

The three primary directional buttons are:

Back to top

ALT + B

The BACK button enables you to move back to the previous page.

ALT + X

The NEXT button enables you to move to the next page. In some cases, you must first input information before you press the NEXT button.

ALT + C

The CANCEL CONTRACT button displays on various pages within a contract. Click on this button if you want to end the contract completely. All input, while in this contract, is discarded when you use the CANCEL CONTRACT button.

CHECK BOXES

Check boxes can be checked and unchecked using the mouse. To do this click the left mouse button while the cursor is pointing in the box.

You can also use the keyboard to check a box. Move the cursor over the checkbox by pressing TAB. With the cursor highlighting the check box, press the SPACEBAR to check or uncheck the box.

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HYPER-TEXT LINKS

On several pages there are small pictures called icons, as well as underlined text. When you move the cursor over these items, the cursor changes from an arrow to a pointing hand. The hand indicates a hypertext link. If you click (or in some cases double-click) on this item when the hand is visible, the application moves to the new page or new area of the existing page indicated by the hypertext link. After clicking on a hypertext link, the color of the text and underline changes to a

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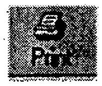
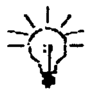
different color to indicate that you have selected this hypertext link.


regular cursor


hypertext link cursor



You can print any page within this application by clicking on the print icon found on the menu bar at the top of the browser page. Press CTRL + P if you prefer to use the keyboard instead of the mouse.



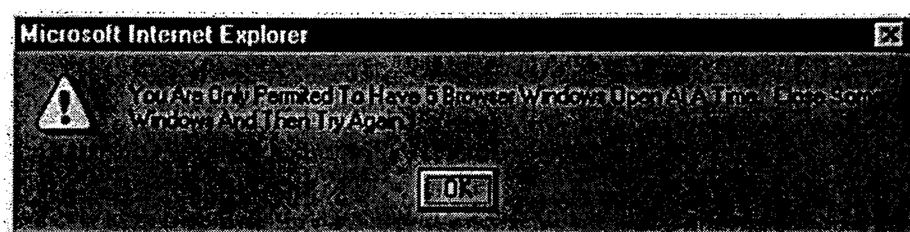
There is no auto-advance feature within this application. As you complete a field, make sure you press TAB to go to the next field. For example: If you are required to entered a date, you will notice there are three separate fields that make up the date information. The first 2-digit field is the month, the next 2-digit field is the day, and the last 4-digit field is the year. To complete entry to these fields:

1. Type the *2-digit month.*
2. Press TAB to move to day field.
3. Type the *2-digit day.*
4. Press TAB to move to the year field.
5. Type the *4-digit year.*
6. Press TAB to move to the next field.

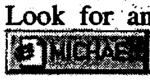
The application enables you to have five pages open at the same time. This count does not include the main or home page. This gives you a lot of flexibility and exposure. For example: You can open more than one contract, or open a contract and look at your available rooms report at the same time. If you try to open more than five pages, the application displays the following warning message.

Click on 

to continue.



Check to see if you have minimized any contract, report, or management pages. This information is on the TASK bar at the bottom of the screen next to 

. Look for any pages with the Microsoft Internet icon next to the page name. 

Click on the item and this redisplays the page.

Example of TASK BAR with four Microsoft Internet pages plus the home page minimized. All are in open status.

Once you retrieve the page, complete one of the following depending on the page you are on:

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Within a contract:

- Click on the Cancel Contract to close a contract and not save the changes made during this session.
- Input the remaining contract information. On the RENTAL AGREEMENT page, click Save to complete the contract.

Within a report or management page:

- Click Back until you return to the HOME page.

As you complete a contract, close a report or close a management page the minimized button on the TASK BAR at the bottom of the screen disappears. When you have fewer than six (the STORAGE MAIN MENU or HOME page is not part of the five-page limit), then you can open additional pages.

Back to top
Go to "Reporting problems"

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Terminology

Basic terms used through this guide are listed below:

- *Active Page* – The front-most page (window) on the desktop. The page that accepts any keyboard input.
- *Browser* – Software used to navigate the World Wide Web, the graphical area of the Internet.
- *Client/server* – A distributed computing system in which personal computers or workstations function as 'client' that request service from print servers, file servers, database servers, etc., which may be located at remote sites.
- *Cursor* – A rectangle or line on the screen that shows exactly where you are working.
- *Customer Type* -- U-Haul currently has four unique customers.
    - *Business* customers are set up to use a credit card as payment. These customers are also considered automatic payment customers.
    - *Corporate* customers are businesses who have established credit through U-Haul International®. These customers have a credit line, which requires an authorization number acquired through the credit card/check processing dial-up function.
    - *Individual* customers are people who rent rooms from U-Haul for personal use. These customers may choose the automatic payment option, which enables you to charge their credit card for rent and services on a regular bases. These customers may also choose to mail you a payment by check, or pay in person each period.
    - *System Use* customer is a U-Haul entity that uses a room for U-Haul business.

    STOP

    Independent dealers are excluded from SYSTEM USE designation. Dealers are business people who have a contractual agreement with U-Haul. They are not part of the U-Haul corporate structure. Dealers who rent from U-Haul can be one of the other customer types depending on their relationship with U-Haul International.
- *FAQ* – Frequently asked questions; new users tend to ask the same questions. A page within this application contains these questions and their answers for readers to print and read at their leisure.
- *Home page* – The main page where you can start a contract, create a report, view inventory, complete management functions, etc.
- *Host* – Any computer on a network that is a repository for services available to other computers on the network.
- *Hypertext link* – An icon or underlined text that when clicked on takes you to another page or different area on the current page.
- *Interface* – The method of using software, often described as 'text-based' or 'graphics-based.' The term also can refer to a common or shared boundary between instruments, devices or systems that enables exchange of information among devices.

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- *Internet* – The Federal Networking Council gives the following definition: "The global information system that (i) is logically linked together by a globally unique address space based on the Internet Protocol (IP) or its subsequent extensions/ follow-ons; (ii) is able to support communications using the Transmission Control Protocol/Internet Protocol (TCP/IP) suite or its subsequent extensions/follow-ons, and/or other IP-compatible protocols; and (iii) provides, uses or makes accessible, either publicly or privately, high level services layered on the communications and related infrastructure described herein."
- *Intranet* – An internal or company-operated Internet that can be used only by those who are directly connected to the company's computer network.
- *Login* –As a noun, it refers to the name used to gain access to a computer system. As a verb, it means the act of entering a computer system.
- *Network* – Two or more computers sharing resources.
- *PC* – Personal computer; used in reference to IBM-compatible machines.
- *User ID* – Each user that is permitted to use the application must have a code that uniquely identifies them to the computer. In *WebSelfStorage,* you are required to enter your social security number or some other identification word or number combination. Enter this code followed by a password when logging in.
- *Web page* – A document containing information and requiring input, which can be seen on the Internet by using a browser program such as Microsoft® Internet Explorer.
- *Windows* – Application software using graphical user interface.
- *World Wide Web* – (also WWW) Part of the Internet that offers graphics and user hypertext links to point users to additional information.

Back to top
Go to "WebSelfStorage Overview"

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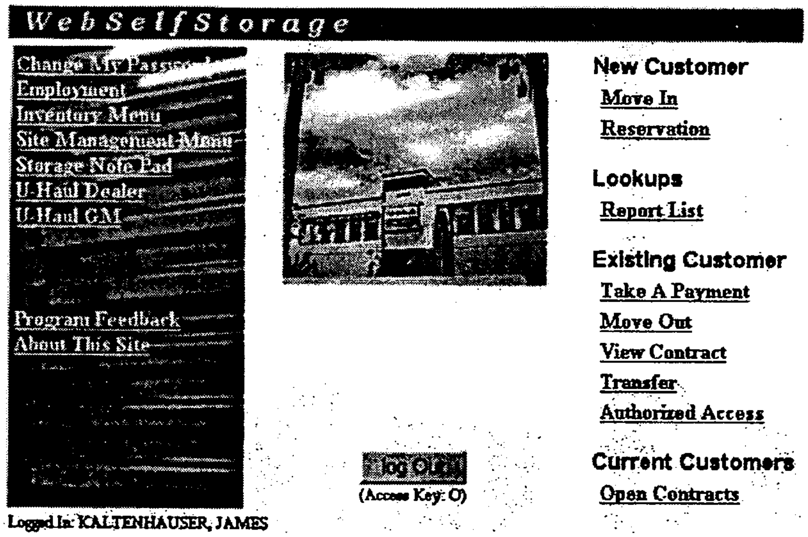
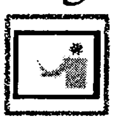
Example of Main Menu page.

Each user is assigned a list of functions they can perform. For this reason, the screen view varies according to the user's security clearance.



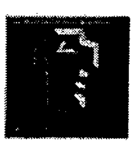
Storage Main Menu (Home Page)



The MAIN MENU, or HOME page, is partitioned into two primary sections. The information to the left of the screen, with an orange storage door image as background, provides you with the management section of the application. The selections in the white on the right side of the screen provide you with transaction processing and reporting.

Notice your name appears under the orange storage door image in the lower left corner of the page. This identifies the current login user. Make sure you check this each time before you begin to use the application. If you are not the login user displayed on the page, log out and log in under your id and password.

Below is a brief definition of each selection. Certain selections may not be available to you depending on your access rights.



CHANGE MY PASSWORD
- Enables a user to establish a new password anytime.

EMPLOYMENT
- Still under construction.

INVENTORY MENU
- Provides a page to review room inventory and change the walk around order of specific rooms.
- Provides a page for setting up auctions (only available to storage manager at the marketing company).

SITE MANAGEMENT
- Provides a screen to add, edit and review user information.
- Provides an opening process that prints reports and letters from the

prior night's batch process.

- Provides a closing process that sends a transaction file to BEST for processing and completes the nightly batch process.
- Provides a full security gate update function that interfaces with PTI Falcon or DIGIGATE 102, sending these external software applications the room and customer status for room inventory.
- Provides a screen to manually input existing customer and contract information.

STORAGE MESSENGER
- Provides a way of sending notes between centers and marketing companies.

STORAGE NOTE PAD
- Provides a note pad screen where a short note to a customer can be typed and printed. This note is not saved.

U-HAUL DEALER
- Link to dealer lookup page.

U-HAUL GM
- Link to the U-Haul General Managers' web site.

TRAINING
- Provides instructional pages to help you learn how to use this application.

WEBCARD
- Link to Dealer equipment rental application.

ROOM/TRUCK EQUIVALENCY CHART
- Provides instructional pages to help you learn how to use this application.

PROGRAM FEEDBACK
- Provides a way for you to communicate issues and concerns to the development team at U-Haul International.

ABOUT THIS SITE
- Provides a list of system members who are on the *WebSelfStorage* development team at U-Haul International.

MOVE IN
- Enables you to complete a move in contract.

RESERVATION
- Enables you to complete a QUOTE or CONFIRMED reservation, change an existing reservation, or review a remote reservation you received from the Sales and Reservations Department at U-Haul International or another authorized storage location.

TAKE A PAYMENT
- Enables you to record the payment on an existing contract.

MOVE OUT
- Enables you to record the moving out of an existing customer. A move out can only be done when the customer is current with their payment, or after the entire balance due is written off.

VIEW CONTRACT
- Enables you to review an existing customer's contract, including viewing and printing the ledger, or reprinting a customer receipt.
- Enables you to recall a reservation contract and complete a move in.
- Enables you to recall a reservation quote and collect a deposit changing the status of the reservation to "confirmed."

TRANSFER
- Enables you to move a customer from one room or rooms to another room or rooms. This process prorates existing payments carrying any unused money to the new room.

AUTHORIZED ACCESS
- Provides a list of people who have security access to the room.

OPEN CONTRACTS
- Provides a list of contracts you currently have opened.

REPORT LIST – Provides the following reports:

- AUTO PAYMENT CUSTOMERS REPORT – a complete list of all customer who authorize you to use their credit card as payment.

- CASH DRAWER SUMMARY REPORT – enter a specified date range to view transactions completed for this period.

- COLLECTION WORKSHEET – enter a specific number of days late to see customer information and balances due on delinquent rooms.

- DOWNLOADED RESERVATIONS REPORT from the Sales and Reservations Department.

- EXPIRING CREDIT CARDS REPORT – enter a specific number of days prior to the date expired to view customers' credit card information. Use this report to call customer and update their contracts before the credit card expires.

- FACILITY UTILIZATION REPORT for the current day. Provides a recap of rooms rented, earned income and potential income lost because of delinquencies and vacant rooms.

- FAILED AUTO PAYMENTS REPORT listing all credit card transactions that failed during the nightly batch process. Reasons

vary from expiration dates in the past to credit card declined by authorization center.

- INVOICING CUSTOMERS REPORT is a list of all customers requiring invoice billing.

- LOCK ACTION REPORT is a list of customers with a change in lock action for a specified date range.

- MOVE OUT REPORT listing all customers who have specified their move out date on a contract.

- NIGHTLY BATCH LETTERS provides a list of letters that were generated for a designated date.

- NIGHTLY BATCH STATUS REPORT provides the results of this process for a designated date.

- NO SHOW RESERVATIONS REPORT provides a list of reservations for a specific date that were not used by the customer and have been removed from your system.

- RENT ROLL provides detail customer information; move in date; paid through date; number of days occupied; and balance owed.

- ROOMS AVAILABLE REPORT provides a list of rooms by size code and rate that are available to rent.

- SAFESTOR COVERAGE REPORT provides a list of customers who pay for this protection.

- SECURITY ACCESS CODES provides a list of customers and their PTI security access codes.

- SECURITY ACCESS IN/OUT provides a history of when each customer entered and exited the storage facility. (Not yet in production.)

- UNIT MIX REPORT provides the occupancy/vacancy mix report for a specified date.

- UNIT PRICE LIST REPORT provides a recap of the different size codes at your facility and the price associated with each size code.

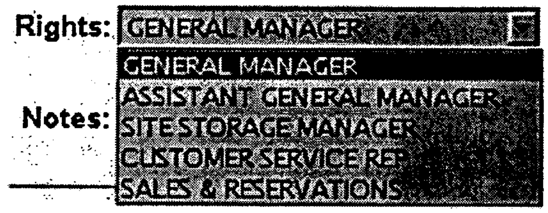
- WALK AROUND SEQUENCE REPORT provides you with your room inventory in walk around sequence, as well as the lock-status of each room.

Passwords can be alphabetic, numeric or a combination of both.

Press TAB or click in the next field to move between fields.

A list of the two-digit state abbreviations can be found in the appendix section of this manual. See state abbreviations within the APPENDIX-QUICK REFERENCE section

Click next to the RIGHTS. This displays all rights available.



Click on the name of the RIGHT; or press the DOWN-ARROW key until the cursor is over the RIGHT, press ENTER to select this RIGHT.

Note: Access rights are established and controlled at U-Haul International.

Currently, a center has five levels.

The SALES & RESERVATIONS level is for system members who complete remote and local reservations only.

The CUSTOMER SERVICE REP level is for counter personnel who complete storage transactions.

The SITE STORAGE MANAGER level, as the name implies, is for the system member who maintains the storage facility at the center level.

The ASSISTANT GENERAL MANAGER level is for the system member who manages the store when the general manager is not there.

The GENERAL MANAGER level is for the center manager at this facility.

Currently, a marketing company has four levels as well:

The MARKETING COMPANY PRESIDENT level is for the MCP to view all centers' information.

The MCO EXECUTIVE ASSISTANT level is for the system member who helps support all center locations.

The MCO FACILITY MAINT. level is the system member at the marketing company who maintains all construction and repair for the marketing company and its centers.

The MCO STORAGE MANAGER is the system member who is responsible for overseeing all storage locations including the scheduling of auctions.

The SALES & RESERVATIONS level is normally used by the Sales & Reservations department at U-Haul International to create remote reservations.

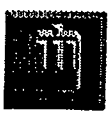
Each level has rights to specific pages according to the job description. If you have difficulty completing your job because of restrictions on your access rights, talk with your supervisor or manager. If the consensus is that more flexibility is

To deactivate a user access account from the list page:

1. Type the *first few letters* of the *first name* and/or *last name* of the user in the corresponding field on the LOOKUP A STORAGE ACCESS USER page.
2. Press ALT + X. A list of records appears.
3. Press TAB until the cursor is over the picture frame icon to the left of the record.
4. Press ENTER.
5. Press TAB, on the detail page, until the cursor is over the checkbox **Deactivated Account** at the top of the page.
6. Press the SPACEBAR to check the box.
7. Press ALT + S to save.
8. Press ALT + B to return to the MAIN MENU.

Reviewing room inventory

Room inventory is captured in the conversion program. This program takes all rooms, applying the right sizecode and rate to each room. Only single rooms are converted. The UHI storage group has to re-establish combined room inventory for you.



To review inventory using the mouse:

1. Click on INVENTORY MENU on the left side of the HOME page.
2. Click on ROOM INVENTORY on the INVENTORY MENU page.

To review inventory using the keyboard:

1. Press TAB until the cursor is over INVENTORY MENU on the left side of the HOME page.
2. Press ENTER.
3. Press TAB until the cursor is over ROOM INVENTORY.
4. Press ENTER.
5. Press TAB until the picture frame icon next to the room you want to edit is highlighted.
6. Press ENTER.

This is an example of the INVENTORY MENU page. Depending on your security access, you may have other selections as well as ROOM INVENTORY.

Inventory Menu

Room Inventory

Click On An Underlined Item To View

Back

(Access Key: B)

Room Inventory

Entity: 828061 **Date: 4/25/2001**

The ROOM INVENTORY page displays.

The rooms are listed in ascending numeric order.

	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
	102 5X10X8	1 SINGLE NOCLIMATE	VACANT		$64.95
	103 5X10X8	1 SINGLE NOCLIMATE	VACANT		$64.95
	104 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	105 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		$64.95
	106 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	107 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		$64.95
	108 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	109 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	110 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	111 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	112 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	113 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	114 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	115 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	116 5X10X8	1 SINGLE NOCLIMATE	DELINQUENT		$64.95
	117 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	122 5X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$64.95
	123 10X10X8	1 SINGLE NOCLIMATE	OCCUPIED		$84.95

To view and make changes to the walk around sequence:

1. Click on the picture frame icon to the left of the room you want to edit.

   or

   Press TAB until the cursor is over the picture frame icon of the room you want to edit. Press ENTER to select.

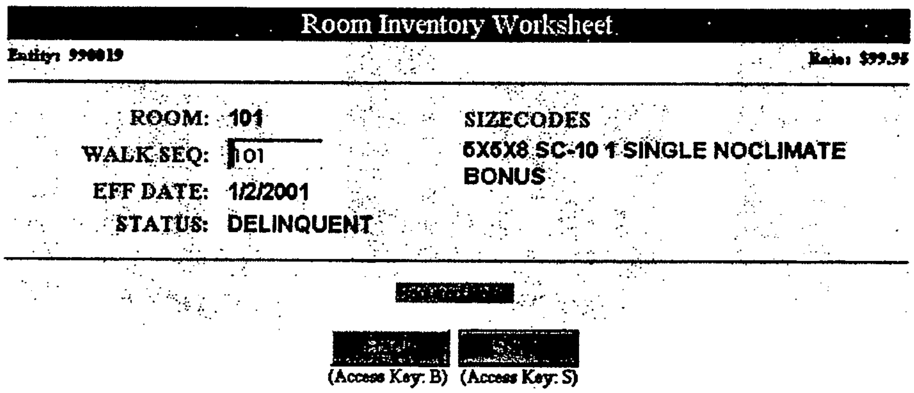
The term WALK AROUND refers to the sequence in which you walk the facility. Setting up the walk around sequence is useful if you use the WALK AROUND REPORT each morning to walk your facility. This report enables you to check the status of each room. It is a tool to assure that *WebSelfStorage* has the same access lock status as the physical rooms. To review the WALK AROUND REPORT click here.

To update walk around sequence using the mouse:

1. Press INSERT to set the field to overtype.
2. Type the *new walk around sequence number* in the WALK SEQ field.
3. Press INSERT again to turn off the overtype feature.
4. Click on [SAVE] to update the record.

To update walk around sequence using the keyboard:

1. Press INSERT to set the field to overtype.
2. Type the *new walk around sequence number* in the WALK SEQ field.
3. Press INSERT again to turn off the overtype feature.
4. Press ALT + S to update the record.



Understanding combined rooms

A combined room is two or more rooms that have been designed as 'combined' by the U-Haul Storage Production Group at U-Haul International. When the Storage Production Group combines rooms, the individual rooms are no longer available to rent. The only available room is the combined room.

Note: The individual rooms cannot be rented until the combined room is vacant and the Storage Production Group unlinks the rooms. If you have a combined room that is no longer occupied and you want to rent one of the rooms, contact the Storage Production Group and ask that they unlink the rooms.

1343 5X10X8	1 UPPER CLIMATE	OCCUPIED		$64.95
1344 10X10X8	1 UPPER CLIMATE	OCCUPIED		$104.95
1345 5X10X8	1 UPPER CLIMATE	DELINQUENT		$64.95
1346 5X10X8	1 UPPER CLIMATE	OCCUPIED		$64.95
1347-49 10X10X8	1 UPPER CLIMATE	VACANT	1347, 1349	$104.95

An example of a combined room is shown above. Room # 1347-49 is really two rooms, 1347 and 1349, combined into a new room with a new rate. Notice the individual room numbers are listed in the second to the last column on the ROOM INVENTORY page.

Reviewing all customer and contract information

Compare the RENT ROLL REPORT in *WebSelfStorage* to Domico's report. Make sure each customer's name, move in date, room number, current rate, and paid through date are the same as Domico's.

Compare the COLLECTION WORKSHEET in *WebSelfStorage* to Domico's report. Make sure each customer's name, room, paid through date, fees and rent due, as well as total due are accurate. Check to make sure the days late is the same on both reports.

Compare the UNIT PRICE LIST BY SIZECODE in *WebSelfStorage* to Domico's report.

Compare the UNIT MIX REPORT in *WebSelfStorage* to Domico's report.

Adding Pre-existing Customers

Occasionally a customer's record may have errors that cannot be corrected within the contract. An example would be if the PAID THROUGH DATE is no longer correct. When this occurs, the only option is to clear the customer's record by completing a move out. Once the move out is completed, then a MANUAL CONVERSION contract can be done.

The MANUAL CONVERSION process is also used at storage facility that are newly acquired by U-Haul. If your storage location does not use Domico, the MANUAL CONVERSION process must be used to record existing customer information into *WebSelfStorage.*

Adding Existing Customer / Contract Information

Before you start recording customer contracts in *WebSelfStorage* you must retrieve the following information from each customer file:

The customer's name, address, phone number, driver's license, social security or secondary identification number.

The customer type – Example: Individual, business, corporate move, or system use.

The alternate contact or contacts' name, address, and phone number.

Any other person who has access to the room.

The room or rooms the customer is renting.

The current paid through date for each room.

The room rent, if different from UHI established rate.

The customer's balance.

The next bill date.

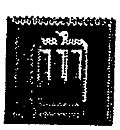
Any services used – Example: Safestor or invoice billing.

A unique security gate access code and zone.

If customer is set up for automatic payment using their credit card, need their credit card number and the expiration month and year.

If customer is set up for invoice billing.

The status of this account. Example: current, first delinquency, second delinquency, in lien status.



To input a customer's contract thru the MANUAL CONVERSION process using the mouse:

1. Click on SITE MANAGEMENT MENU.
2. Click on MANUAL CONVERSION to view the CHOOSE A CUSTOMER

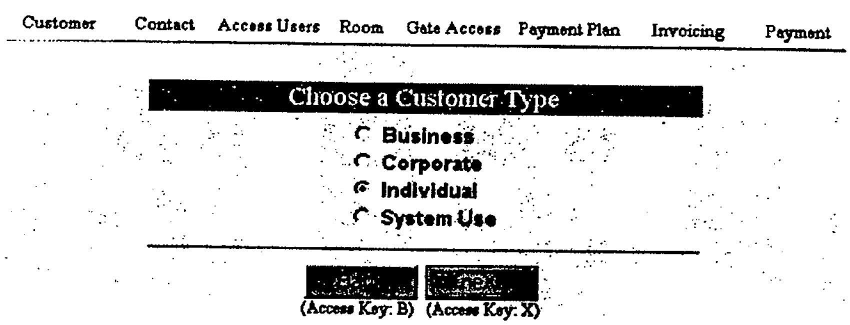
TYPE page.

3. Click on CUSTOMER TYPE of the customer you are entering.
   Note: This demonstration uses the screens and functions of an INDIVIDUAL CUSTOMER TYPE.
4. Click to continue.

To input a customer's contract thru the MANUAL CONVERSION process using the keyboard:

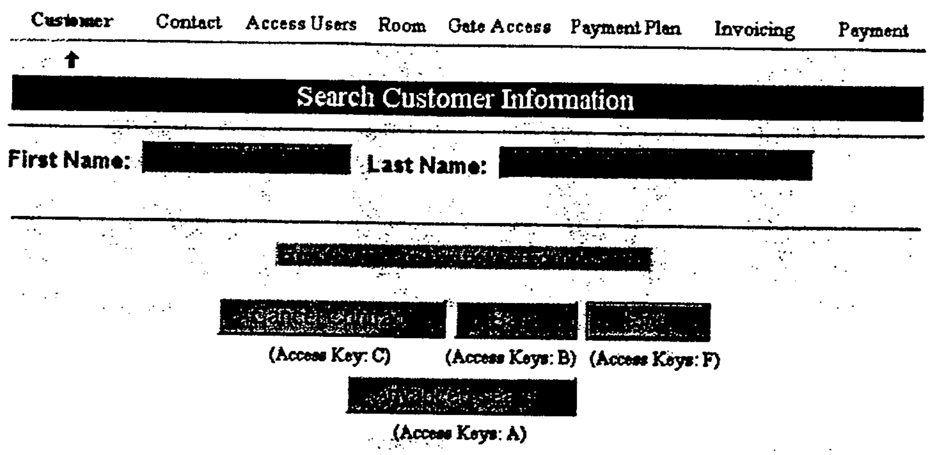
1. Press TAB until the cursor is over SITE MANAGEMENT MENU.
2. Press ENTER.
3. Press TAB until the cursor is over MANUAL CONVERSION to view the CHOOSE A CUSTOMER TYPE page.
4. Press ENTER.
5. Press UP or DOWN ARROW to move cursor over the CUSTOMER TYPE.
6. Press ALT + X to continue.

Example of CHOOSE A CUSTOMER TYPE page



The next step is to add the customer information. The customer database grows as you input customers. Once a customer is input, you never have to add them a second time. For this reason, the next page asks for the first and last name of the customer.

Completing a regular customer search



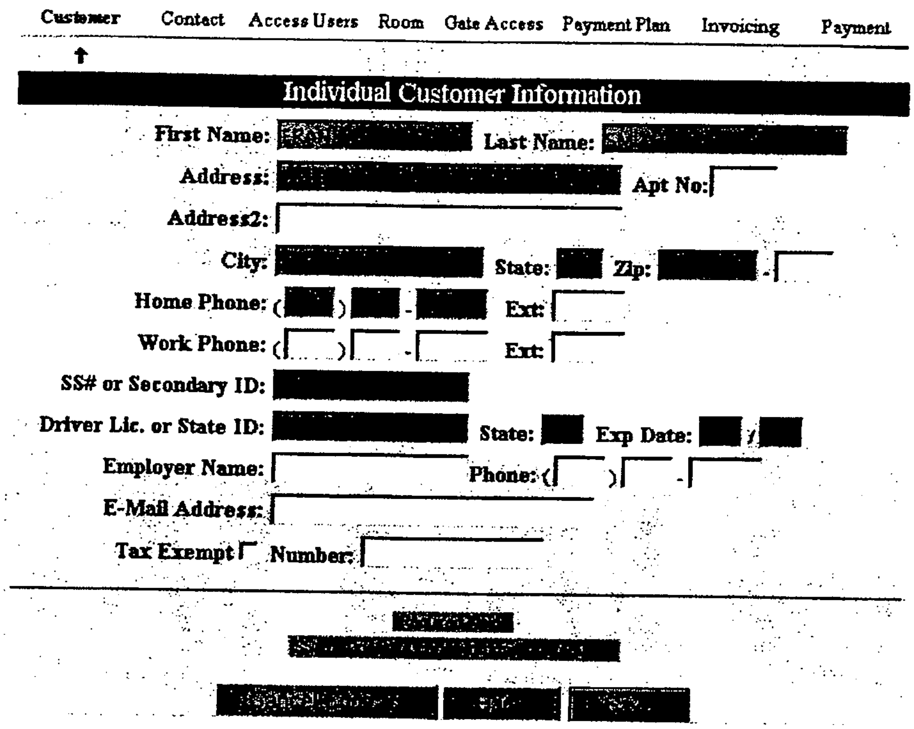
To search for a customer:

1. Type the complete *customer's first* and *last name*, or a portion of either the *first* or *last name* in the fields indicated.
2. Click to continue the search.

If the customer's record is found it displays on the INDIVIDUAL CUSTOMER INFORMATION page.

If the customer's record cannot be found, the INDIVIDUAL CUSTOMER INFORMATION page displays with the customer name appearing in the proper fields. In this case, you would need to complete the form, adding all customer information to the page before clicking on .

This is an example of the page that displays when a customer record is not found. Type the remaining customer information in each field. Press TAB to move between fields. Click Save *or press ALT + S when you are done.*



Notice the blue and green-background colors on several fields. The blue-background means that the field must have some information entered before you can save it. The green-background, on the CUSTOMER INFORMATION page, requires you enter either a social security number or secondary id; or the customer's driver's license information.

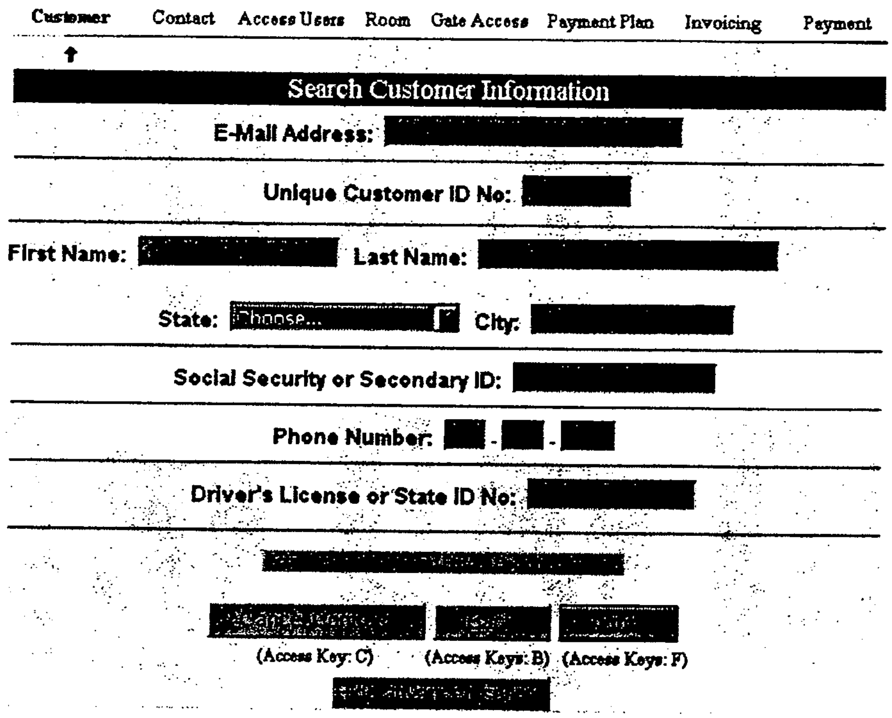
Completing an advanced customer search

You can also do an advance search, which is similar to the contract search done within a MOVE IN, TAKE PAYMENT, VIEW CONTRACT, TRANSFER, or MOVE OUT contract.

To complete an advance search:

1. Click on the Advanced Search or press ALT + A.

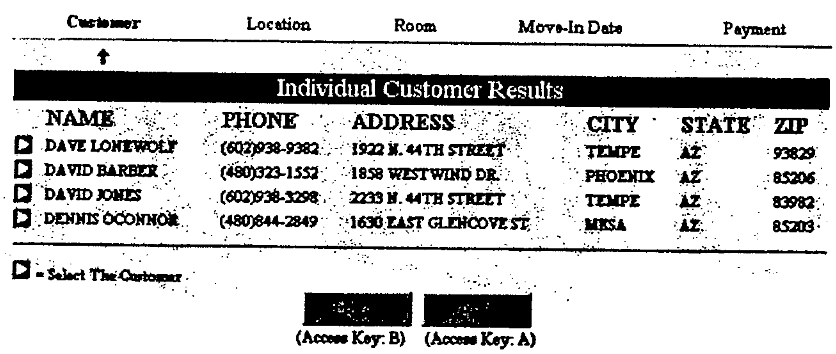
Fill in at least one of these fields before clicking or pressing ALT + F.



Choosing a customer from a list

If more than one customer matches the criteria entered, the INDIVIDUAL CUSTOMER RESULTS page displays with all customers listed.

Click the blue-arrow icon next to the customer you want to use, or press TAB until the cursor is over the blue-arrow icon, then press ENTER to select.

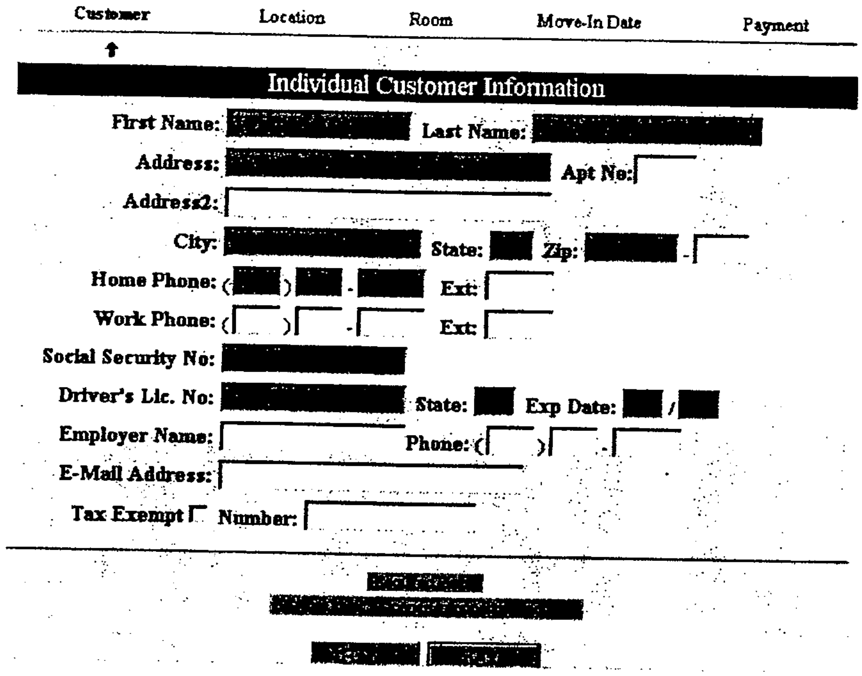


If the customer information you want does not display, you can click or press ALT + A to add the customer information for the first time.

If you want to re-enter your search criteria, click or press ALT + B to go back to the search input screen.

Adding a new customer

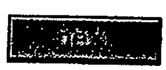
The INDIVIDUAL CUSTOMER INFORMATION page provides you with the fields needed to add a new customer.

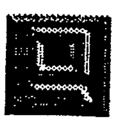


Notice the blue and green background fields. The blue-background fields require input, while the green-background field, on this page, require either the customer's social security number or other identification number; or the customer's complete driver's license information. This includes their license number, state, and expiration date

A complete list of state codes can be found in the quick reference section of this manual.

To input customer information using the mouse:

1. Click in the field you want to input information.
2. Type the corresponding information in the field.
3. Repeat steps 1 and 2 until all fields are input.
4. Click  when done.



To input customer information using the keyboard:

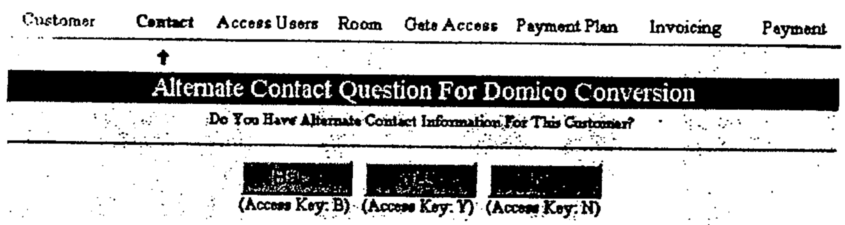
1. Press TAB until the cursor is in the field you want to input.
2. Type the *corresponding information* in the field.

3. Repeat steps 1 and 2 until all fields are input.
4. Press ALT + X when done.

Entering alternate contact on a pre-existing customer contract

The next step in the MANUAL CONVERSION process is to add the alternate contact information. An alternate contact is important for two reasons. First, it gives you another person or persons you can notify in case of an emergency. Second, in some states, the law requires a contact person be kept on file when renting a storage room.

Since you may be converting data at a center that does not use Domico, in some cases you may not have an alternate contact available.



To accommodate this, a question page displays.

To continue when you do not have alternate contact on file for this customer:

1. Click or press ALT + N. Continue with <u>completing process with no alternate contact.</u>

To continue when you do have alternate contact information on file for this customer:

1. Click or press ALT + Y. <u>Continue with completing process with alternate contact</u>.

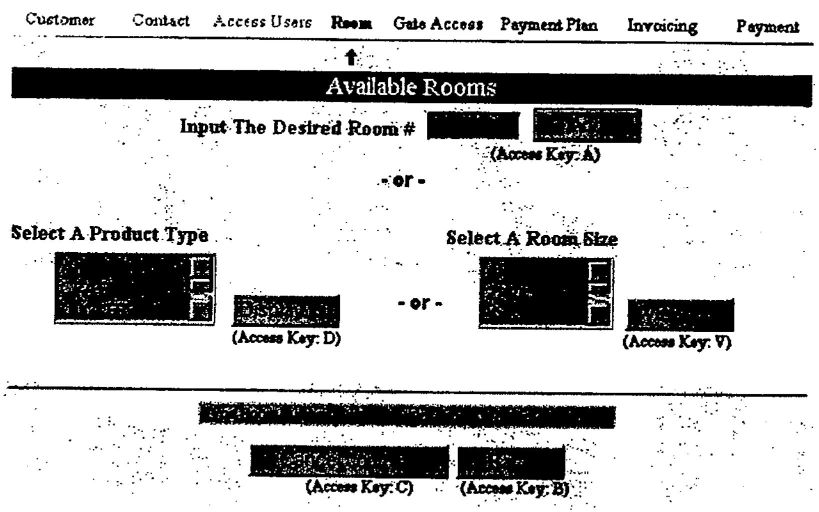
To return to the CUSTOMER INFORMATION page:

1. Click or press ALT + B.

Adding Rooms

The next step is to add all rooms rented by this customer.

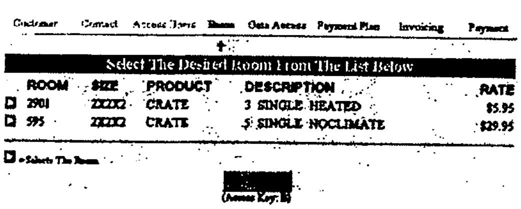
Example of AVAILABLE ROOMS page.



The AVAILABLE ROOMS page provides you with three options to add a room.

If you know the room number:

1. Type the *room number* in the INPUT THE DESIRED ROOM # field.
2. Click Add or press ALT + A to add.



If you know the product type:

1. Click on an item within the list SELECT A PRODUCT TYPE on the left side of the page.
2. Click Display or press ALT + D to view a list of rooms for this product type.
3. Click on the blue-arrow icon next to the room you want to add.

If you know the room size:

1. Click on a size within the list SELECT A ROOM SIZE on the right side of

3. Past due.

If a customer is current with no balance owed or overpaid, then the RENT/SERVICES DUE, FEES DUE, and CREDIT BALANCE all are zero. In this case, the PAID-THRU DATE is set to a date in the future.

If a customer is past due, an amount is required in the RENT/SERVICES DUE and possible the FEES DUE fields

RENT/SERVICES DUE requires the total amount the customer owes on rent, recurring and one-time charges. This amount also includes all sales tax associated with these charges. In this case, the PAID-THRU DATE is set at a date in the past. In the above example, the customer paid through January 31, 2001. The customer owes:

A month's rent	$39.95
7% tax on the rent	2.80
A month's Safestor charge	18.00
TOTAL	60.75

60.75 should be typed in the RENT/SERVICES DUE field in the example above.

FEES DUE is the total amount of delinquency and lien sale charges applied to this account. These fees have not been paid. In the example about, the customer is 28 days late. The first and second delinquency fees have been charged to this account. Each delinquency fee is $15.00; therefore, the customer owes $30.00 in fees.

CREDIT BALANCE is used when a customer is current and has paid more money than was owed with the last charge. This is an overpay balance. In this case, the PAID-THRU DATE is always in the future, and the RENT/SERVICES DUE and FEES DUE fields must remain zero.

Although it is not required, if you have the customer's projected move out date, it can be added to the EXPECTED VACATE DATE field. This is helpful if you want to utilize the EXPECTED VACATE REPORT, also available within this application, to help you manage your occupancy rates. Click <u>here</u> to review this report.

The final step, on this page, is to add all services associated with this room. A list of these services appears below the room information. Next to each service is a check box. Check each box that applies to this customer. In the example above, the customer has SAFESTOR $10,000 included on his account. The items checked do not add to the balance owed, they are used by *WebSelf Storage* to

E-46

Selected Room And Services Information						
ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
571	10X5X8	SC-10	1 SINGLE NOCLIMATE	50	1/31/2001	$38.95
			RECURRING SERVICES			AMOUNT
			SAFESTOR $10,000			$18.00

= Add Services To Room = Delete A Room And/Or Services

You can adjust the RENT and/or SERVICE AMOUNT if the ones shown on this page are incorrect.

ROOM

Click on the picture frame icon next to the ROOM title if the rate that displays under RENT on this page is incorrect.
All rental rates that are less than the standard rate will have a rate change applied in the first nightly batch process after this conversion. **Continue with adjusting room rate below.**

RECURRING SERVICES

Click on the picture frame icon next to the RECURRING SERVICES title if a rate on one or more services is incorrect. **Continue with adjusting recurring service fee below.**

Adjusting room rate

Type the correct rate in the RENT field. Click [button] or press ALT + S to save this change.

Adjust The Room Rental Amount				
ROOM	SIZE	PRODUCT	DESCRIPTION	RENT
571	10X5X8	SC-10	1 SINGLE NOCLIMATE	38.95

(Access Key: B) (Access Key: S)

Adjusting recurring service fee

Type the correct charge in the AMOUNT field. Click [button] or press ALT + S to save this change.

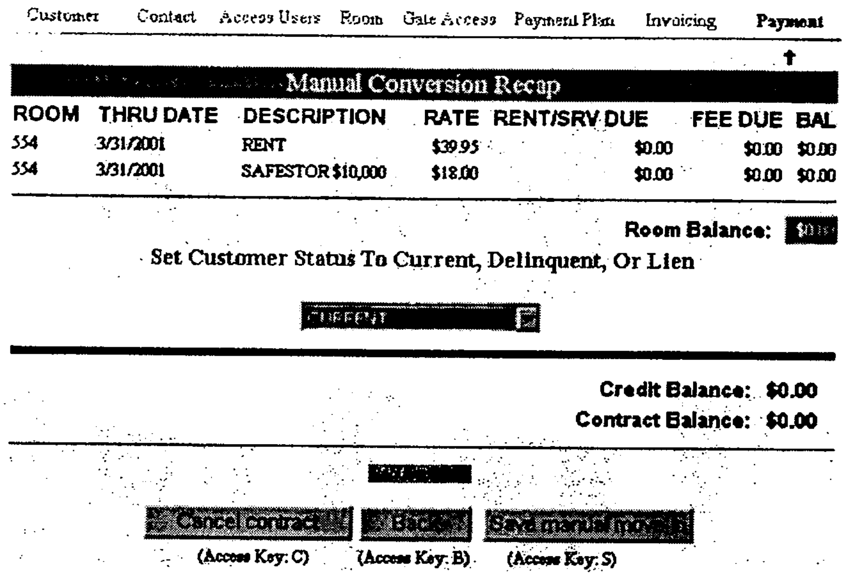
Adjust Service Item Amount				
DESCRIPTION	ROOM	START DATE	NEXT DUE	AMOUNT
SAFESTOR $10,000	571	2/1/1999	1/31/2001	18.00

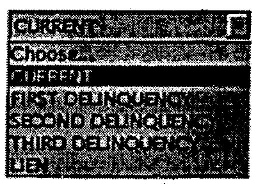
(Access Key: B) (Access Key: S)

After adding all rooms with services and adjusting needed rates, click [button] or press ALT + X to continue.

Completing the pre-existing customer contract

The MANUAL CONVERSION RECAP page shows all charges and the current balance. Make sure this information is accurate before continuing. Use the Back *button if you need to return to a page and adjust any dollars or room information.*





Click on the under the SET CUSTOMER STATUS TO CURRENT, DELINQUENT OR LIEN. Select the customer's status.

A customer is current if their paid through date is in the future and their balance due is zero, or there is a credit balance.

A customer is in first delinquency if the first late fee has been applied.

A customer is in second delinquency if the first and second late fee has been applied.

A customer is in third delinquency if the customer has been sent a lien sale warning notice.

A customer is in lien if the customer has been notified that an auction is pending. The sale of their goods will occur if the customer does not make payment on all outstanding charges.

To save this manual move in, click Save manual move in or press ALT + S.

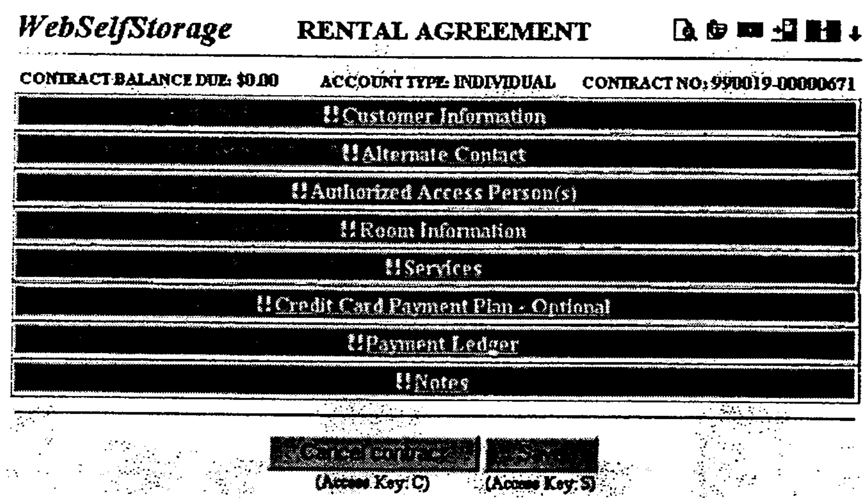
Go to "Customer contracts"

Viewing the RENTAL AGREEMENT page

The RENTAL AGREEMENT is the main page.

The eight titles in blue provide links to all pages used in a contract.
– Example: Customer Information *–*

***Note:** For Corporate Move and Business Account Customer, and System Use customers there are nine titles.*



In the example above, notice several of these titles are underlined while others are not. The underlined items are hypertext links to completed pages containing information. The application keeps track of what you have input and allows you access pages only in a logical sequence. For example, you cannot add a room until you have first added a customer and in some cases an alternate contact. You cannot add a payment if there is no customer or room information.

In addition to these hypertext links, you can review information on this page by clicking the blue, down-arrow icon next to the hypertext link name. This drops down the section and allows view-only access. To open up all view-only sections at one time, click the light-blue, down-arrow icon in the upper-right corner of the page.

Click any of the underlined titles to go to that part of the contract.

or

Use the TAB and ENTER keys to move to these pages.

Using icons within a contract

Notice the contract icons in the upper-right corner of the RENTAL AGREEMENT page.

These icons also are hypertext links. Each takes you to a different page within the contract.

- View a list of customer letters by clicking on this icon. For detailed procedure, click customer letters.
- Add a note about this customer by clicking on this icon. This note page is confidential. Your comments do not print on any receipt or report. For detailed procedure and additional information, click customer notes.

- Collect payment from the customer by clicking on this icon. If the customer's PAID THROUGH DATE is not in the future—meaning the customer owes money, a "payment contract" must be done before a MOVE OUT or TRANSFER. Within this payment contract, you can collect money and, if you have the proper security clearance, write off all or some of the amount owed.
- Move the customer out of the room by clicking on this icon. Can only be done from this icon when the customer is current and his or her PAID THROUGH DATE is in the future. When a customer owes money before moving the customer out, collect a payment for the amount owed, or write off the balanced owed. Finish this "payment contract." From the HOME page, retrieve the contract using the MOVE OUT selection.
- Transfer from one room or rooms to another room or rooms by clicking on this icon. A transfer can only be done from this icon when the customer is current and his or her PAID THROUGH DATE is in the future. If the customer is not current, collect payment or write off the amount owed. Once this "payment contract" is done, click on TRANSFER from the HOME page.
- ↓ The light-blue down-arrow icon displays view-only information for all sections on this page. ↑ The light-blue up-arrow icon is a toggle switch. Use it to close all opened view-only sections. To close the view-only information, simply click the up-arrow. The down and up-arrow toggle switch feature is also available on each of the levels of the contract. Example: To see view-only information for the customer, click the down-arrow next the CUSTOMER INFORMATION name.

To return to the move in process, click here.

Viewing customer letters

All letters generated to a particular customer can be view from the RENTAL AGREEMENT page. Click on the letter with magnifying glass icon at the top, right corner of the page.

This provides a list of all letters for the specific customer by room, it shows the type of letter created, what date it was generated and printed. To view a letter, click on the underline letter name.

Generated Letters			
ROOM	LETTER	PRINTED	GENERATED
922	OVER PAYMENT	2/21/2001	2/21/2001
922	1 DELINQ	4/2/2001	3/26/2001
922	2 DELINQ	4/9/2001	4/2/2001
922	1 DELINQ	4/16/2001	4/12/2001
922	2 DELINQ	4/16/2001	4/12/2001
922	3 DELINQ	4/16/2001	4/12/2001
922	LIEN	4/16/2001	4/16/2001

Back

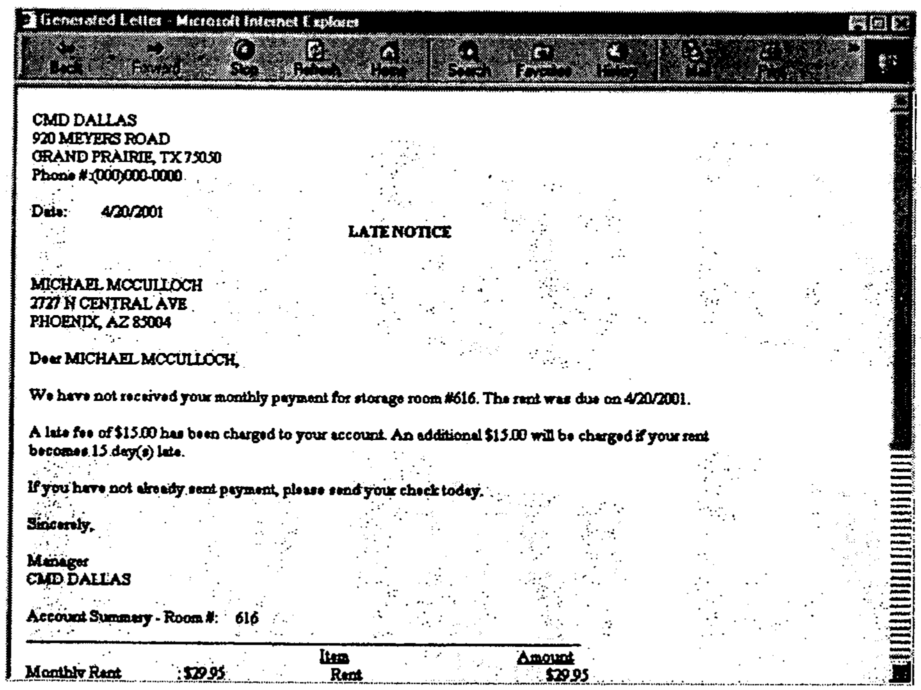
(Access Key: B)

The letter displays on a separate page.

The menu bar provides you with buttons to use for printing and exiting this page when done.

Click Print *to print the letter again.*

Click Back *to return to the previous page.*



Generated Letter - Microsoft Internet Explorer

CMD DALLAS
920 MEYERS ROAD
GRAND PRAIRIE, TX 75050
Phone #:(000)000-0000

Date: 4/20/2001

LATE NOTICE

MICHAEL MCCULLOCH
2727 N CENTRAL AVE
PHOENIX, AZ 85004

Dear MICHAEL MCCULLOCH,

We have not received your monthly payment for storage room #616. The rent was due on 4/20/2001.

A late fee of $15.00 has been charged to your account. An additional $15.00 will be charged if your rent becomes 15 day(s) late.

If you have not already sent payment, please send your check today.

Sincerely,

Manager
CMD DALLAS

Account Summary - Room #: 616

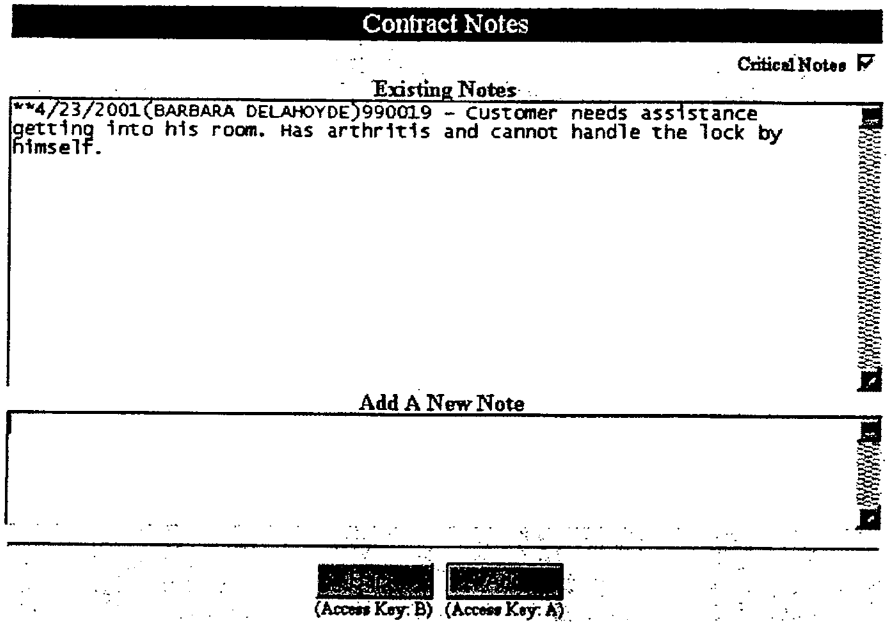
Monthly Rent	$29.95	Item	Amount
		Rent	$29.95

To return to the RENTAL AGREEMENT page from the GENERATED LETTERS page, click Back or press ALT + B.

Viewing and adding customer notes

Customer notes can be added at any time by clicking on the yellow note pad with the paper clip icon in the upper, right corner of the RENTAL AGREEMENT page.

The CONTRACT NOTES page has two sections. The top, or EXISTING NOTES section contains all notes that have been added life-to-date. The ADD A NEW NOTE section enables you to add another note when necessary.



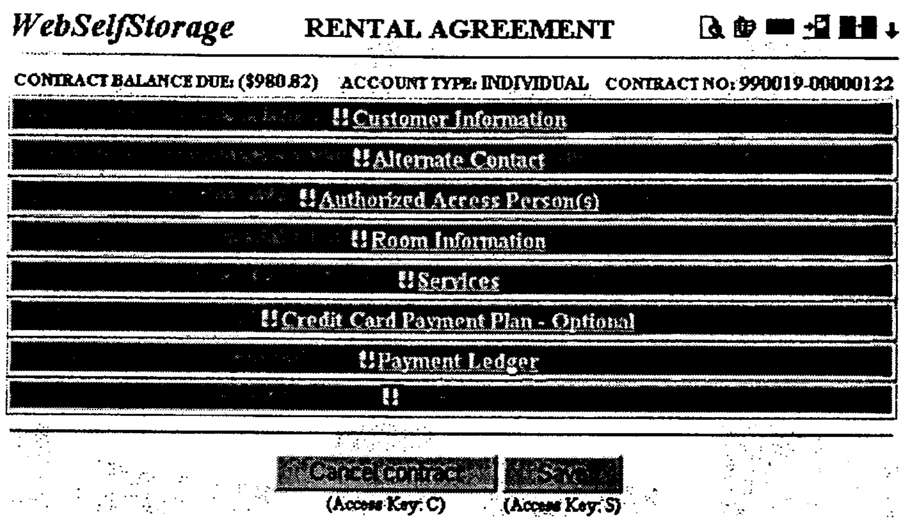
Note: Existing notes cannot be retrieved and edited. They become a historical record as soon as they are added.

To add a note:

1. Start typing in the space provided under ADD A NEW NOTE field.
2. If the note must be read each time you retrieve this customer's contract, click on the CRITICAL NOTES check box in the upper, right corner of this screen.
3. Click [Add] or press ALT + A to add the note to EXISTING NOTES. The note redisplays in the EXISTING NOTES area of the page.

If you checked the CRITICAL NOTES check box on this page, once you return to the RENTAL AGREEMENT page you will find a new name, CRITICAL NOTES, in place of NOTES.

CRITICAL NOTES is now a selection on the RENTAL AGREEMENT page.



This selection flashes white *and* ▇ *to draw your attention to it. Each time you recall a contract and see CRITICAL NOTES on the RENTAL AGREEMENT PAGE, make sure to read the notes before continuing.*

You can also access customer notes by clicking on the NOTES or CRITICAL NOTES hypertext link on the RENTAL AGREEMENT page.

Viewing customer's ledger

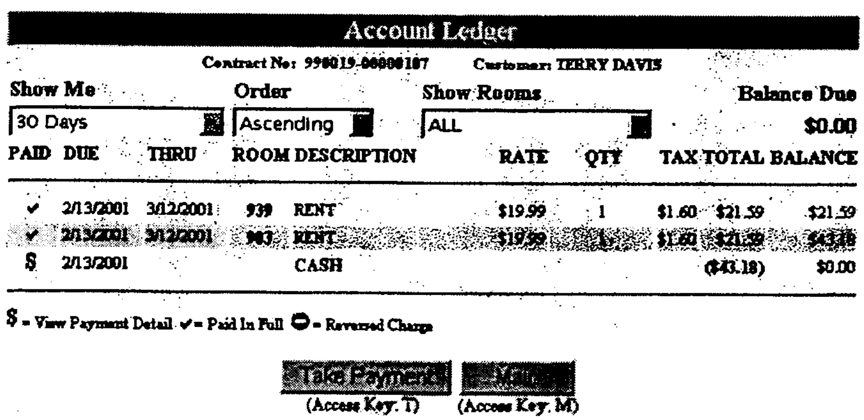
To view a customer's ledger using the mouse:

1. Click on **Payment Ledger** to go to the ACCOUNT LEDGER page from the RENTAL AGREEMENT page.

To view a customer's ledger using the keyboard:

1. Press TAB until the cursor is over **Payment Ledger**.
2. Press ENTER to go to the ACCOUNT LEDGER page.

The ACCOUNT LEDGER page has several important features. The SHOW ME, ORDER and SHOW ROOMS drop-down list box, provide you with different views of the customer information.



information.

To change the display order on the ACCOUNT LEDGER page using the mouse:

1. Click on the ▤ to view the list.
2. Click on one of the selections. The application automatically provides you with the detail in the format you select.

Note: All charges paid-in-full have a check mark in the PAID column.

To change the display order on the ACCOUNT LEDGER page using the keyboard:

1. Press TAB to highlight the selection.
2. Press DOWN ARROW to view this order.
3. Repeat steps 1 and 2 until you get to the order you want to see.

On the ACCOUNT LEDGER screen, click on the $ (payment) to the left of a payment to view the PAYMENTS page. This page shows what charges were included with the specific payment.

Note: The ⊖ (reversal) items reflect fees that were waivered. Both the charge and reversal of charge display as a historical record of the action taken.

Printing previous customer receipts

The PAYMENTS page also provides a way of printing prior receipts.

Notice the ▤ letter icon in the upper-left corner of the page for each payment.

Payments

	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
▤	CASH		/		2/13/2001	$43.18
					TOTAL:	$43.18

Above Payments Covered These Charges

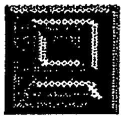
ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID THRU	FEE
939	5X5X8	RENT	2/13/2001	3/12/2001	$21.59
903	5X5X8	RENT	2/13/2001	3/12/2001	$21.59
				TOTAL:	$43.18
				DIFFERENCE OF:	$0.00

▤ = View And Print Receipt

(Access Key: B)

To review a prior receipt using the mouse:

1. Click on the icon for the receipt you want to review or reprint.



To review a prior receipt using the keyboard:

1. Press TAB until the cursor is over the icon.
2. Press ENTER to review.

Click on the menu bar to reprint the receipt.

Click at the bottom of this page, or press ALT + O to close the receipt and return to the ACCOUNT LEDGER page.

U-HAUL *SELFSTORAGE*

Customers Receipt No: Tuesday - 2/13/2001 - 2:38:45 PM
990019-00000107-001
TERRY DAVIS
5522 N. 67TH AVENUE
GLENDALE, AZ 85302
(623)918-9283

CMD DALLAS, 990019
920 MEYERS ROAD
GRAND PRAIRIE, TX 75050
(000)000-0000

ROOM	DESCRIPTION	THRU	PAID	AMOUNT
939	5X5X8 SC-10 2 SINGLE NOCLIMATE	3/12/2001	✔	$19.99
903	5X5X8 SC-10 2 SINGLE NOCLIMATE	3/12/2001	✔	$19.99

Paid Total:	$39.98
UnPaid Total:	$0.00
Tax TX 8.00%:	$3.20
Fee Total:	$43.18
CASH	$43.18
Payment Total:	$43.18
Account Balance:	$0.00

To return to the RENTAL AGREEMENT page from the ACCOUNT LEDGER page:

1. Click or press ALT + M.

If you are working on completing a move in contract, click here to continue the move in process.

If you are reading this section for the first time, and are not completing a move in, you may want to start learning contract processing by doing a move in. Click here to go to the top of the MOVE IN instructions page.

Checking for open contracts

The application provides you with a way of maintain contracts in their present state even if you exit the contract the wrong way.

The proper way to complete a contract includes one of two procedures:

Use this button to cancel a contract.

- On a brand new contract, such as a RESERVATION or MOVE IN, when you click this button all information you entered is deleted.
- On an existing contract, such as from the VIEW CONTRACT, MOVE OUT, or TAKE A PAYMENT selections, when you click on this button all information you entered for this session is deleted. The contract in its original form remains on the database and can be recalled at any time.

Save Use this button to save a contract. This is the only way information entered on the contract is saved. If you exit in any other way, you may loss information that was input during this session.

- From the RESERVATION page if you are doing a QUOTE or CONFIRMED reservation, you must click this button in order to save the contract and create a receipt.
- From the RENTAL AGREEMENT page on MOVE INS, MOVE OUTS, TRANSFERS, and PAYMENTS (TAKE PAYMENT) after entering all information including collecting payment you must return to this MAIN page and click this button to complete the contract and create a receipt.

If you exit the contract in any other way, the contract remains open under your user ID and cannot be recalled by anyone else.

For this reason, it is important for you to periodically click the OPEN CONTRACT from the HOME page to make sure you have close all contracts correctly.

Current Customers
Open Contracts

To check for open contracts:

1. Click on OPEN CONTRACTS on the HOME page.
   or
   Press TAB until the cursor is over OPEN CONTRACTS. Press ENTER to

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select.

If all your contracts have been completed properly, the OPEN CONTRACTS page looks like this.

BARBARA DELAHOYDE Has These Contracts Open		
NUMBER	**TYPE**	**NAME**
	No Contracts Open	

☐ = Recalls contract

Back
(Access Key: B)

There are no contracts open in the above example. To return to the HOME page click Back *or press ALT + B. No other action is needed.*

If a contract or contracts were closed improperly or were left open, the contract information appears on the OPEN CONTRACTS page.

BARBARA DELAHOYDE Has These Contracts Open		
NUMBER	**TYPE**	**NAME**
☐ 990019-00000000	INDIVIDUAL	MACHACA ABDULA
☐ 990019-00000071	INDIVIDUAL	BARBARA VON OPPENFELD

☐ = Recalls contract

Back
(Access Key: B)

To recall an open contract:

1. Click on the blue-arrow icon ☐ next to the contract. This recalls the contract and displays the page you where on when you closed it improperly.

2. Click Back or next until you are on a page where Cancel Contract or Save displays.

3. Click on the Cancel Contract button if you want to cancel the contract.

   or

   Complete the remaining steps of the contract and return to the RESERVATION or RENTAL AGREEMENT page, click on Save to complete the contract.

Once you have completed or cancelled a contract, return to the OPEN CONTRACTS page. <u>Press F5 to refresh the page</u>. This removes the contract you properly closed from the list. Repeat the above steps for each of the open contracts listed.

STOP

The CLOSING PROCESS cannot be done if contracts are left in open status. Make sure you check for open contracts before you clock out at the end of your shift.

Completing a reservation quote

With *WebSelfStorage* you can complete reservation quotes for your customers. A quote is a communication between you and a customer who is inquiring about the availability of a room or rooms and the cost associated with the rental. The customer does not provide a deposit with this type of exchange.

The procedure for completing a quote and confirmed reservations are identical up to the point where you collect a deposit.

A quote can be turned into a confirmed reservation by recalling the contract and collecting a deposit.

Read this section to understand how to complete a reservation. When you get to the end of the QUOTE procedure in this section, you will find a link to the CONFIRMED RESERVATION. This will take you to the procedure on collecting payment and completing the confirmed reservation.

In this section of the manual we review:

Contract location pointers

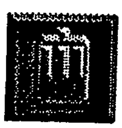
Repeat customer search

Add a new customer

Select an entity from the state list

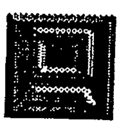
Entity specific screen

Change a quote to a confirmed reservation.



To begin a reservation using the mouse:

1. Click RESERVATION under NEW CUSTOMER on the MAIN MENU.



To begin a reservation using the keyboard:

1. Press TAB until the cursor is over RESERVATION.
2. Press ENTER.

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Click the city the customer wants to rent from.

If you want to return to the LOCATION page, click Back *or press ALT + B.*

Customer	Location	Room	Move-In Date	Payment

AZ - Choose A City From The List Below

CHANDLER	COTTONWOOD	GILBERT
GLENDALE	MESA	PEORIA
PHOENIX EAST	PHOENIX WEST	SCOTTSDALE
SURPRISE	TEMPE	TUCSON
YUMA		

(Access Key: M) (Access Key: B)

The list of centers for this city displays.

Notice the icons to the left of each city. If the icon is a blue-arrow, you can select the center by clicking on this icon.

Customer	Location	Room	Move-In Date	Payment

GLENDALE, AZ - Choose A Location From The List Below

%OCC	ENTITY	NAME	ADDRESS	PHONE
100.00%	721058	U-HAUL 51ST & GLENDALE	5024 WEST GLENDALE AVENUE	(602)238-9841
100.00%	721061	U-HAUL CENTER 67TH & BELL	6544 WEST BELL ROAD	(602)238-9880
100.00%	882056	U-HAUL STORAGE CACTUS&51S	12280 NORTH 51ST AVENUE	(602)938-4472

= Entity Does Accept Remote Reservations = Entity Does Not Accept Remote Reservations

(Access Keys: M) (Access Keys: B)

If the icon is a red not-sign, the entity does not accept remote reservation. If the customer wants to complete a reservation at this center, he or she may want to call the center directly.

Below is an example of the same page with red and green squares

%OCC	ENTITY
100%	828059
5.56%	828061
100%	828068
100%	883049

There are several other visual cues on this page.

Notice the small green, yellow and red square boxed to the right of the occupancy percentage for each location. The color of the square is your cue to help the customer make an informed decision on the location they want to rent from. The percentage gives another indication of how likely the customer will find a room at this particular center.

- If the box color is green, the storage facility has rooms available for rent. This is a good center to direct a customer to.
- If the box color is yellow, the storage facility has rooms available, but it is not certain that the room the customer is quoted will be available at the time they want to rent the room.
- If the box color is red, the storage facility has very few rooms available to rent. If the center is at 100% occupancy, it is unlikely that a room will be available when the customer wants to rent it.

If the customer insists on renting from a room with a high occupancy rate in the red range, use the phone number displayed on this page to call the center. Find out how likely the customer would be to rent the room size he or she wants at the time they need it. The center may want to complete the reservation on their computer over the phone to assure the customer that the room will be available when they want to move in.

If the customer wants to check another city, click Back to return to the city page. Select another city and review its centers' occupancy rates.

Entities that accept remote reservations show a blue arrow icon next to the center record. If the red, not sign icon displays next to a storage facility, call the center, or give the customer the center's phone number and see if the center would want to complete a LOCAL RESERVATION from their *WebSelfStorage* application.

To select a center using the mouse:

1. Click the blue-arrow icon next to that center.

To select a center using the keyboard:

1. Press TAB until the cursor is over the blue arrow icon next to the center.
2. Press ENTER to select.

Reviewing the entity specific screen

The SELECTING SIZECODE page provides you with a wealth of information.

The SELECTED ROOMS section of the page grows as you add room sizecodes to the contract.

Customer   Location   Room   Move-In Date   Payment

Selected Rooms

SIZE	PRODUCT	FL	ELEV	CLIMATE	BONUS	SQ.FT.	RATE

There Are No Rooms Currently Selected

Move-In Date: ?

Available Rooms

room/truck equivalency chart

	SIZE	PRODUCT	FL	ELEV	CLIMATE	BONUS	SQ.FT.	VACANT	%OCC	RATE
⃠	5X10X10	MINI	1	OUTSIDE	NOCLIMATE		50	0	100% ■	$54.95
⃠	5X10X10	INTERIOR	1	SINGLE	CLIMATE		50	3	91% ■	$59.95
⃠	10X10X10	MINI	1	OUTSIDE	NOCLIMATE		100	0	100% ■	$69.95
▶	10X10X10	INTERIOR	1	SINGLE	CLIMATE		100	30	66% ■	$79.95
⃠	10X15X10	MINI	1	OUTSIDE	NOCLIMATE		150	4	93% ■	$89.95
⃠	10X20X10	MINI	1	OUTSIDE	NOCLIMATE		200	0	100% ■	$119.95

Occupancy Percentage Range Bar

0%   40%   100%

Reservation For Room Occupancy Below 1 Is Not Permited

▶ = Selects A Size ⃠ = No Units Available In This Sizecode = Removes A Selected Size

The AVAILABLE ROOMS section of the page displays all sizecodes at this facility

Several visual cues on this screen help you determine if there are rooms in a particular sizecode available to rent. The list of available rooms provides the following information:

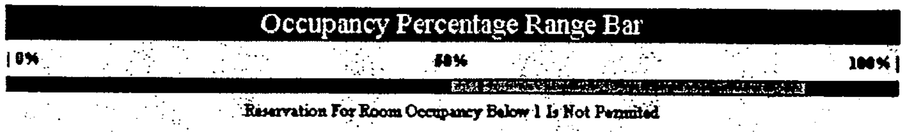
- The SIZE, PRODUCT, FLOOR, ELEVATION, CLIMATE, and BONUS description.
- The square foot available in each sizecode.
- The number of room currently vacant.
- A percentage that indicates the number of rooms currently rented in this size as compared to total rooms of this size (rooms rented for this sizecode / total rooms for this sizecode * 100 = occupied percentage of total rooms.)
- Each line shows a small colored box next to this percentage. This visual cue tells you whether the sizecode has available rooms to rent. The Marketing Storage Production Group at U-Haul International sets percentage guidelines within the application that control this display.
    - ■ Green indicates that there are rooms available to reserve and rent. At the start of each line with a green indicator, you will find a blue-arrow icon ▶. If the customer wants this size room, simply click on this arrow to continue.
    - ■ Yellow indicates that there are rooms available to reserve, but that caution should be used in reserving this sizecode. Too many reservations will cause this entity to run out of

rooms leaving customers with reservations and unable to rent the size they requested.

- ■ Red indicates that there are no rooms available. At the beginning of lines with this red indicator, notice a not available icon. You cannot select this size room.

- The rental rate enables you to quote the rate to the customer.

A visual PERCENTAGE BAR at the bottom of this page shows the distribution settings.



In this example, the green range represents room rental occupancy of up to50%. The yellow, or caution range, reflects room rental occupancy of between 51 and 90%. Any sizes with occupancies above 90% cannot accept new reservations.

In addition to this PERCENTAGE BAR, notice the message under it. This tells you that an additional control does not permit reservations once occupancy reaches a set number of rooms.

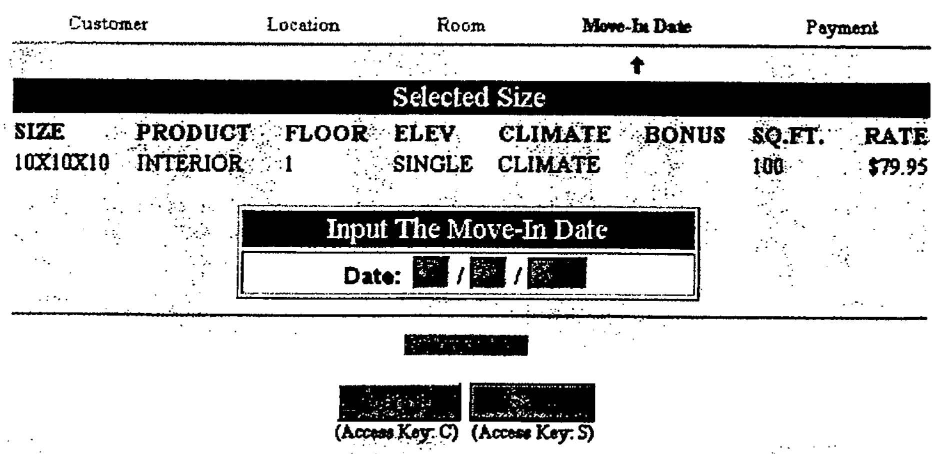
To select a sizecode using the mouse:

1. Click the blue-arrow icon to the left of the sizecode the customer wants to reserve.

To select a sizecode using the keyboard:

1. Press TAB until the cursor is over the blue-arrow icon to the left of the sizecode the customer wants to reserve.
2. Press ENTER.

The MOVE-IN DATE page requires you type the date the customer plans to move into the room. A MOVE IN DATE is required for both quotes and confirmed reservations.



Date format is MM / DD / YYYY

The FEES DUE page displays. Since this is a QUOTE, no money is collected. Make sure to tell the customer what the BALANCE DUE amount is. You can also print this page if necessary.

Customer	Location	Room	Move-In Date	Payment

Fees Due

SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X10	RENT DEPOSIT	$79.95	$0.00	$79.95

Balance Due: $79.95

(Access Key: T)

(Access Key: M)

Click Main *or press ALT + M to continue.*

Quote reservation

The RESERVATION page displays. Notice the ACCOUNT TYPE field indicates this is a QUOTE. This page is very similar to the RENTAL AGREEMENT PAGE already discussed.

WebSelfStorage **RESERVATION**

BALANCE DUE: $79.95 **MOVE-IN DATE:** 5/22/2001 **ACCOUNT TYPE:** QUOTE **RES NO:** 828068-00000008

!! Customer Information

!! Location

!! Room Information

!! Payment

(Access Key: C) (Access Key: S)

Here are two hypertext links to related section of the user's manual.

To review the meaning of the icons at the top, right corner of the RESERVATION page, click **Icon Descriptions**.

To review information about the RENTAL AGREEMENT page, click **Rental Agreement Page**.

Click Save or press ALT + S, to complete the RESERVATION QUOTE.

1. Click on the dollar icon in the upper, right corner of the page.

Collect the Balance Due from the customer. Review <u>TAKE PAYMENT</u> *if necessary.*

Customer	Location	Room	Move-In Date	Payment

Fees Due

SIZE	DESCRIPTION	FEE	TAX	TOTAL
10X10X10	RENT DEPOSIT	$79.95	$0.00	79.95

Balance Due: $79.9[illegible]

Select Payment Type

Payment Type: Choose...

(Access Key: B) (Access Key: X)

Review finishing a CONFIRMED RESERVATION by clicking <u>here</u>.

<u>Go to Confirmed Reservation</u>

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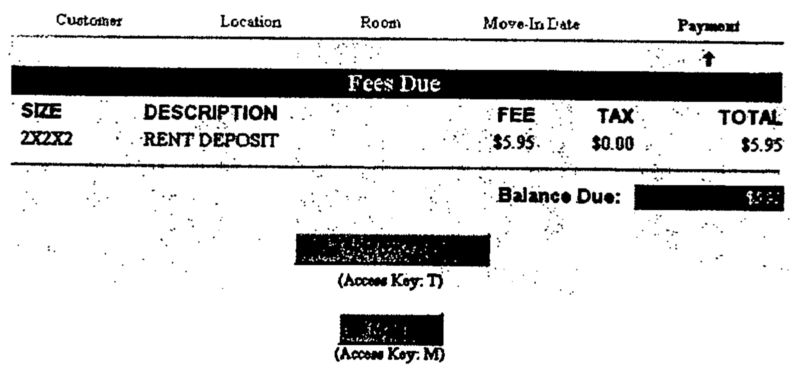
Completing a confirmed reservation

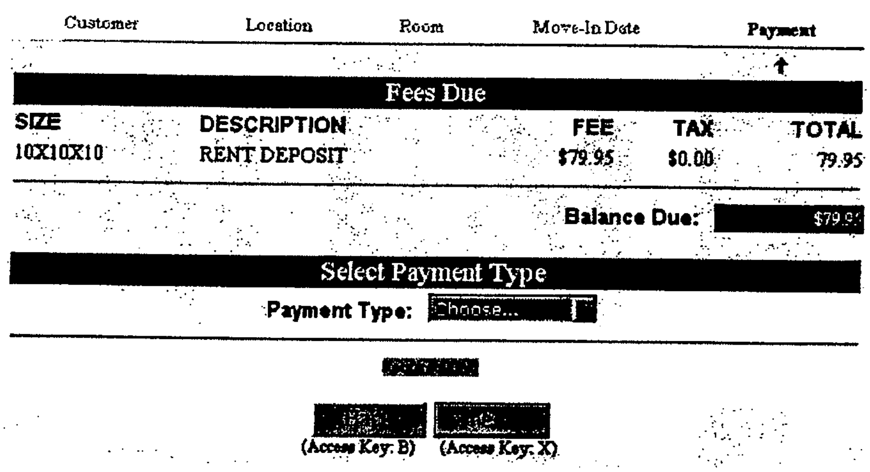
A CONFIRMED RESERVATION requires the customer pay a deposit to hold the room.

The same pages are used as a QUOTE. To walk through the process, see <u>Completing a reservation quote</u>. The difference comes at the point where you collect money.

On the FEES DUE page, click on **Take payment** *or press ALT + T to continue.*



The Select Payment Type displays at the bottom of this same page.



Click <u>here</u> to review procedures on taking payment.

Payments

A customer can pay for a reservation deposit, rental or other service using any of the traditional TENDER TYPES including:

__Cash__

__Check__

__Credit Card__

__Money Order__

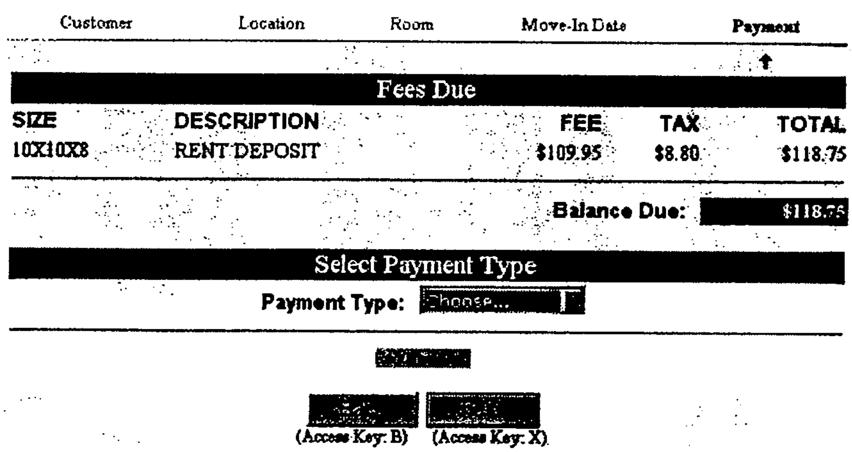
From time to time, a customer may also want to redeem coupons given to them by your center or another U-Haul facility as a good will gesture to assure their continued patronage. Both A. T. & T and VIP __Coupons__ can be deducted from the total amount owed.

Certain types of customers also have special PAYMENT TYPES. Such CUSTOMER TYPES include:

__System Use__

__Corporate Account__.

Whenever you click Take payment or press ALT + T, the SELECT PAYMENT TYPE section of the FEES DUE page displays.



The SELECT PAYMENT TYPE section of the FEES DUE page displays.

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The other two buttons on this page enable you to exit the check payment process when necessary.

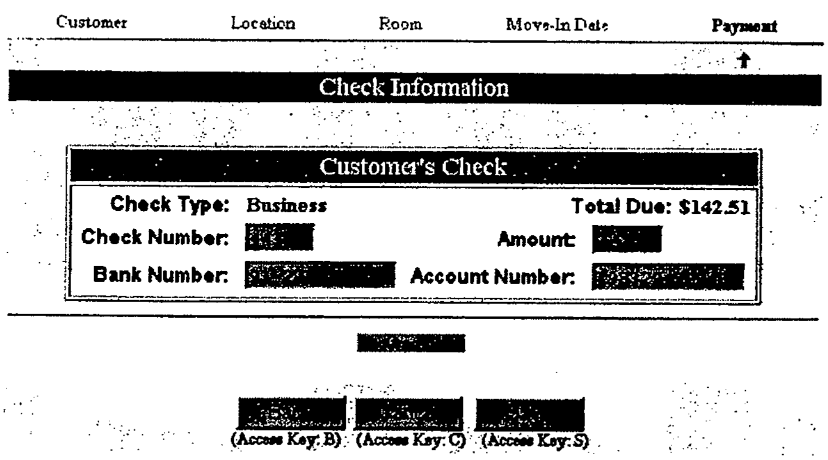
Exiting Check Payment

Click to return to the FEES DUE page.

Click to return to the CHECK TYPE page.

When the CHECK INFORMATION page displays, if the check was swiped, the BANK NUMBER, CHECK NUMBER and ACCOUNT NUMBER fields are filled in by the application.

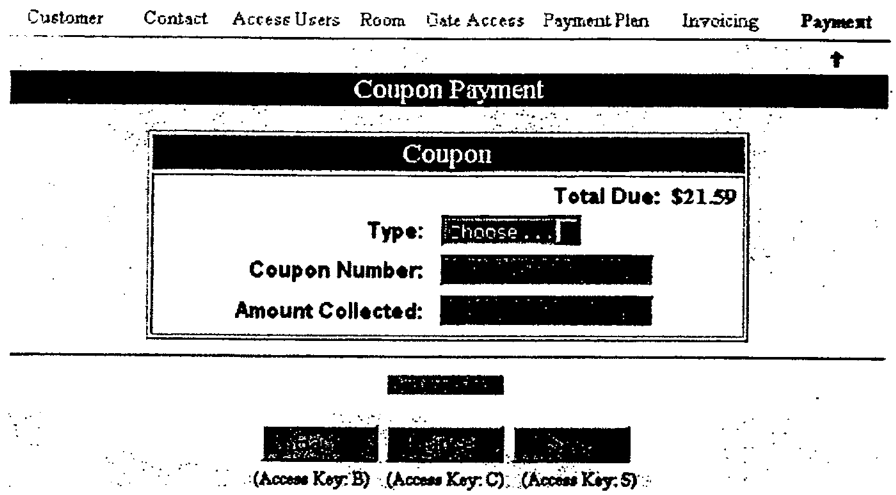
If you typed the *driver's license information* on the CUSTOMER INFORMATION page at the beginning of the contract, this information displays in the DRIVER'S LICENSE INFORMATION section of the CHECK INFORMATION page.

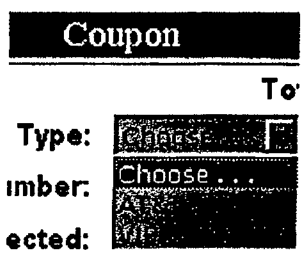


*The **BUSINESS** check page requires the check number, bank number, amount of check, and bank account number.*

Recording coupon redemption

Redemption of a coupon requires you select the type of coupon, enter the coupon number, and record the amount of the coupon.





COUPON TYPES include:

- AT&T – U-Haul customers receive incentive information printed on their rental contract's ticket jacket to choose AT&T as their long distance service provider. Those who participate receive 100 free minutes of long-distance service and a U-Haul gift certificate to be used on rentals of self-storage rooms, equipment or trucks.
- VIP Certificate – An alternative to reimbursing cash, this provides incentive for the customer to use U-Haul products and services again. This certificate is valid for two years from the issue date. A U-Haul representative writes this issue date on the certificate before giving it to the customer. Certificates come in $10.00 and $20.00 increments.

To select a COUPON TYPE using the mouse:

1. Click on the next to the COUPON TYPE to view all types available.
2. Click on the type the customer is redeeming.
3. Click in the COUPON NUMBER field.
4. Type the *coupon number*.
5. CLICK in the AMOUNT COLLECTED field.
6. Type the *coupon amount*.
7. Click

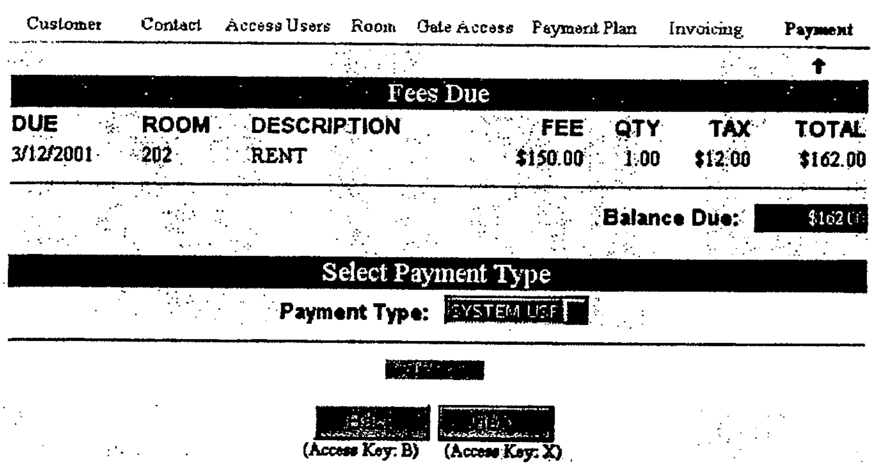
To select a CREDIT CARD TYPE using the keyboard:

1. Press DOWN ARROW until the correct coupon type displays in the window.
2. Press TAB.
3. Type the *coupon number* in the corresponding field.
4. Press TAB.
5. Type the *amount of the coupon* in the corresponding field.
6. Press ALT + S.

Recording system use payment

Within the AMERCO corporation, there may be a corporate entity that needs a room to store inventory, assets, or other items. With the proper approval, the entity can complete a SYSTEM USE rental contract with an AMERCO corporate storage facility. The renting entity is considered a SYSTEM USE customer. "Orange dollars" record income to the storage center and expense to the renting entity. A PAYMENT TYPE is set up for this purpose. The only time this PAYMENT TYPE displays is when the CUSTOMER TYPE is designated at SYSTEM USE.

On the FEES DUE page, the only PAYMENT TYPE available is SYSTEM USE.



To record a system use payment using the mouse:

1. Click on the next to the PAYMENT TYPE to view.
2. Click on SYSTEM USE.
3. Click .

To record a system use payment using the keyboard:

1. Press DOWN ARROW until SYSTEM USE PAYMENT TYPE displays.

Moving in

A MOVE IN can be completed by:

Recalling a CONFIRMED RESERVATION for a customer who previously reserved a sizecode and now wants to move in.

Starting a MOVE IN for a customer who did not complete a reservation before hand.

Confirmed reservation move in

Move in without a reservation

Moving in from a confirmed reservation

A CONFIRMED RESERVATION can be done in one of three ways.

You can complete a CONFIRMED RESERVATION from your *WebSelfStorage* application. See CONFIRMED RESERVATION for details on this procedure.

Another storage location can complete a remote reservation selecting your center as the facility that the customer will rent from.

The Sales & Reservation department at U-Haul International will complete confirmed reservations for your center.

The customer should have a storage reservation number. This is given to them over the phone, in the case of Sales and Reservations, or in person at the center in which they completed the reservation. This confirmation number is the contract number you need to view.

Existing Customer

Take A Payment
Move Out
View Contract
Transfer
Authorized Access

Clicking on VIEW CONTRACT under EXISTING CUSTOMER on the HOME or MAIN page to recall a CONFIRMED RESERVATION.

See Viewing a contract if you need instructions on getting to the RESERVATION page shown next.

Both of the above hypertext-linked pages provide a button to return you to this page. Remember, you can also use ALT + B to activate this button using the keyboard.

To select a room using the mouse:

1. Click on the blue arrow next to the room the customer wants to rent.

To select a room using the keyboard:

1. Press TAB until the cursor is over the blue arrow next to the room the customer wants to rent.
2. Press ENTER.

The MOVE IN page requires you review the NEXT BILL DATE, and add any services.

Input The Next Bill And Expected Vacate Date

Next Bill Date: / /

Edit Date If Customer Request A Different Bill Date

Vacate Date: / /

Leave Blank If Vacate Date Is Not Known

Select Services To Be Attached To This Room

ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
708	5X20X8	SC-10	1 SINGLE NOCLIMATE	100	6/1/2001	$29.95

DESCRIPTION	AMOUNT
☐ SAFESTOR $10,000	$18.00
☐ SAFESTOR $15,000	$24.00
☐ SAFESTOR $4,000	$6.00
☐ TEST DESCRIPTION DONT USE	10.00%
☐ CLEANING	$25.00
☐ LOCK REMOVAL	$50.00
☐ TEST 2 DONT USE!!!!!!!!!	$5.00
☐ TEST 3 DONT USE!!!!!!	$10.00
☐ $5 OFF FIRST MONTH	($5.00)

To complete the MOVE IN page using the mouse:

1. Review the NEXT BILL DATE field. The default is always a month from today.
2. If you want to change this *date*, click in the MONTH, DAY, or YEAR field and overtype.

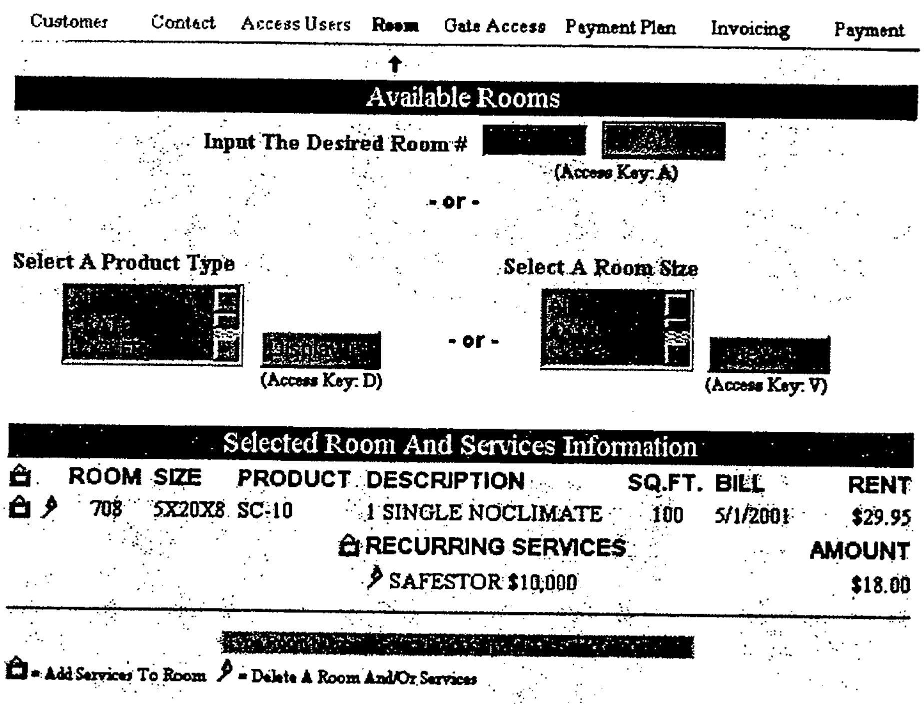
Note: When the BILL DATE changes, the application automatically pro-rates the amount due a full-month plus the difference in days. In the above example, the current date is May 1, 2001. The default is set to the next month, which is June 1, 2001. If the customer wants to change the bill date to the fifth of the month, you would type **06/05/2001**. A date earlier than June 1, 2001 generates

The pages for ALTERNATE CONTACT and AUTHORIZED ACCESS are identical to a MOVE IN contract without a reservation. Go to the <u>Alternate contact</u> to review these procedures.

When you get to the procedure on adding a room, click to return to these procedures. Adding rooms on a reservation is slightly different from adding rooms on a standard move in.

Showing room on a move in from a confirmed reservation

The AVAILABLE ROOMS page shows the room you selected under SELECTED ROOM AND SERVICES INFOR-MATION.



To edit room information and add services, click the picture frame icon next to the room number.

To delete services, click on the flaming match icon next to the recurring service you want to remove.

To remove the room and all services attached to it, click on the flaming match icon next to the room number.

To change the room rental rate, click on the picture frame icon next to the ROOM description. Click <u>here</u> to review procedures.

To change recurring services rates, click on the picture frame icon next to the RECURRING SERVICES title. Click <u>here</u> to review procedures.

If you want to add another room, click <u>here</u> to review procedures.

Adjusting rental amount

The picture frame icon next to the ROOM description is available if the RENT amount is not accurate.

Adjust The Room Rental Amount

ROOM	SIZE	PRODUCT	DESCRIPTION	RENT
708	5X20X8	SC-10	1 SINGLE NOCLIMATE	29.95

(Access Key: B) (Access Key: S)

When you click the picture frame icon, the ADJUST THE ROOM RENTAL AMOUNT page displays. Type the correct amount in the RENT field and click or press ALT + S.

Adjusting service item amount

The picture frame icon next to the RECURRING SERVICES description is available if service amounts are not accurate.

Adjust Service Item Amount

DESCRIPTION	ROOM	START DATE	NEXT DUE	AMOUNT
SAFESTOR $10,000	708	5/1/2001	5/1/2001	18.00

(Access Key: B) (Access Key: S)

When you click the picture frame icon, the ADJUST SERVICE ITEM AMOUNT page displays. Type the correct amount in the AMOUNT field and click or press ALT + S.

After adding all rooms and making the necessary adjustments, click on or press ALT + X to continue.

SECURITY GATE ACCESS and CREDIT CARD PAYMENT procedures are identical to the standard move in. Click here to review security gate access procedures. Click here to review credit card payment procedures.

Collecting additional money – move in from confirmed reservation

The FEES DUE page provides you with the balanced owed. The example on the right indicates that the customer owes $26.94.

Click [illegible] *to continue.*

Review **payments** *for procedure on taking a payment.*

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
		OVERPAY CREDIT				-$29.95
5/1/2001	708	RENT	$29.95	1.13	$2.71	$36.55
5/1/2001	708	SAFESTOR $10,000	$18.00	1.13	$0.00	$20.34

Balance Due: [illegible]

● = Waivers Fee

(Access Key: A) (Access Key: T)

Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
CASH		/	$29.95

Total Paid: **$29.95**

(Access Key: L) (Access Key: M)

Once payment is taken, the application automatically goes to the RENTAL AGREEMENT page.

Refunding money – move in from a confirmed reservation

When you collect more money on the confirmed reservation than is needed on the move in, the application provides the amount of money to refund. Give the customer back the amount of money designated as CASH BACK.

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
		Account Is Current, No Fees Due				

Balance Due: $0.00

● = Waivers Fee

(Access Key: A)

Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
CASH		/	$29.95
CASH	CASH BACK	/	($6.85)

Total Paid: **$23.10**

(Access Key: L) (Access Key: M)

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Click **Main** to go the RENTAL AGREEMENT page.

The RENTAL AGREEMENT page recaps the complete contract. Notice under PAYMENT LEDGER that the amount of the deposit is subtracted

WebSelfStorage **RENTAL AGREEMENT**

CONTRACT BALANCE DUE: $0.00 ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000725

Customer Information

Alternate Contact

Authorized Access Person(s)

Room Information

Room	Size	Status	Autopay	Bal Due	Moved In	Next Due	Access Code	Invoice Billing	Rate
708	5X20X8	CURRENT	NO	$0.00	5/1/2001	6/5/2001		NO	$29.95

Services

Credit Card Payment Plan - Optional

Payment Ledger

	Pay Date	Receipt Number	Type	Number	Auth Code	Amount
	5/1/2001 10:50:21 AM		CASH			$26.94
	5/1/2001 10:44:40 AM		CASH			$29.95
	5/1/2001 10:44:38 AM	990019-00000725-001	CASH	CASH BACK		($29.95)

Notes

Cancel contract Save

Reviewing account ledger after a move in from a reservation

If you want to review the ACCOUNT LEDGER before completing the contract, click on the **Payment Ledger** hypertext link.

The ACCOUNT LEDGER shows all reservation and move in transactions.

PAID	DUE	THRU	ROOM	DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE
✔	5/2/2001	5/1/2001	6968	RENT DEPOSIT	$29.95	1	$0.00	$29.95	$29.95
$	5/1/2001			DEPOSIT				($29.95)	$0.00
✔	5/1/2001	5/1/2001	6968	RENT DEPOSIT (reversed)	($29.95)	1	$0.00	($29.95)	($29.95)
$	5/1/2001			REVERSED PAYMENT				$29.95	$0.00
✔	5/1/2001	6/4/2001	708	RENT	$29.95	1.13	$2.71	$36.55	$36.55
✔	5/1/2001	6/4/2001	708	SAFESTOR $10,000	$18.00	1.13	$0.00	$20.34	$56.89
$	5/1/2001			PAYMENT				($29.95)	$26.94
$	5/1/2001			CASH				($26.94)	$0.00

$ = View Payment Detail ✔ = Paid In Full ⊖ = Reversed Charge ⊕ = Waives Selected Fee

Take payment Main

(Access Key: T) (Access Key: M)

E-108

In the above example, the first two records were created at the time of the reservation. Notice a tentative room number was used on this reservation. The remaining records are created at the time the customer moves into the room.

The first record is the original reservation deposit charge.

The second record is the original reservation deposit payment.

The third record is reversing the original reservation deposit charge.

The fourth record is reversing the original reservation deposit payment.

The fifth record is the rent charge on the room the customer is moving into.

The sixth record is a SAFESTOR charge associated with the room the customer is moving into.

The seventh record is the original reservation deposit payment being applied to the move in charges.

The eighth record is the new payment collected at move in. It covers the remaining balance owed.

To see how the application matched payments to charges, click on the dollar sign $ next to each payment record.

The first dollar sign shows the reservation payment.

Click on the ▤ next to the payment type to recall the receipt.

Click Back *to return to the ACCOUNT LEDGER page.*

Payments

	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
▤	CASH		/		5/1/2001	$29.95
					TOTAL:	$29.95

Above Payments Covered These Charges

ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID-THRU	FEE
6968	20X5X8	RENT DEPOSIT	5/1/2001	5/1/2001	29.95
				TOTAL:	$29.95
				DIFFERENCE OF:	$0.00

▤ - View And Print Receipt

Back
(Access Key: B)

The fourth dollar sign shows the OVERPAY CREDIT and CASH collected on the move in being applied to the RENT and SAFESTOR charges.

Click Back *to return to the ACCOUNT LEDGER page.*

Payments

	TYPE	ACCOUNT NO	EXP DATE	AUTH CODE	PAY DATE	AMOUNT
	CASH	APPLIED OVERPAY CREDIT			5/1/2001	$29.95
	CASH				5/1/2001	$26.94
					TOTAL:	$56.89

Above Payments Covered These Charges

ROOM	SIZE	DESCRIPTION	RECORD DATE	PAID-THRU	FEE
708	20X5X8	RENT	5/1/2001	6/4/2001	36.5535
708	20X5X8	SAFESTOR $10,000	5/1/2001	6/4/2001	20.34
				TOTAL:	$56.89
				DIFFERENCE OF:	($0.00)

= View And Print Receipt

Back
(Access Key: B)

To save the contract:

1. On the ACCOUNT LEDGER page, click Main or press ALT + M.
2. On the RENTAL AGREEMENT page, click Save or press ALT + S.
3. Click OK on the message page that asks if you are ready to save.
4. Type your password into the pop-up window provided, if your location requires a secondary check to assure the person who starts the contract finishes it. Click [illegible] to complete the password check.

E-111

If the customer is not on your database, the first and last name are carried to the INDIVIDUAL CUSTOMER INFORMATION page. Click in the ADDRESS field and input the remaining information.

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | Payment

Individual Customer Information

First Name: [redacted] Last Name: [redacted]
Address: [redacted] Apt No:
Address2:
City: [redacted] State: [redacted] Zip: [redacted] -
Home Phone: ([redacted]) [redacted] - [redacted] Ext:
Work Phone: ( ) - Ext:
SS# or Secondary ID: [redacted]
Driver Lic. or State ID: [redacted] State: [redacted] Exp Date: [redacted] / [redacted]
Employer Name: Phone: ( ) -
E-Mail Address:
Tax Exempt Number:

If the customer is found, all customer information displays on this page.

If the customer record is not new, click **here** *to continue.*
If the customer record is new, click **here** *to continue.*

Advanced search feature

The SEARCH CUSTOMER INFORMATION page provides an advanced search feature. This page requires you input a piece of information about the customer. The gray lines indicate the separate search criteria.

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | Payment

Search Customer Information

E-Mail Address: [redacted]
Unique Customer ID No: [redacted]
First Name: [redacted] Last Name: [redacted]
State: [redacted] City: [redacted]
Social Security or Secondary ID: [redacted]
Phone Number: [redacted] - [redacted] - [redacted]
Driver's License or State ID No: [redacted]

(Access Keys: B) (Access Keys: F)

E-114

The search feature is very flexible. One or more fields must be filled in before beginning the search. You can:

Type the *customer's first* and/or *last name*, or a *partial first* and/or *last name*.

Type a *city* and/or select a *state*.

Type the *customer's social security number*, or other *secondary identification number*.

Type the *customer's phone number*

Type the *customer's driver's license number*.

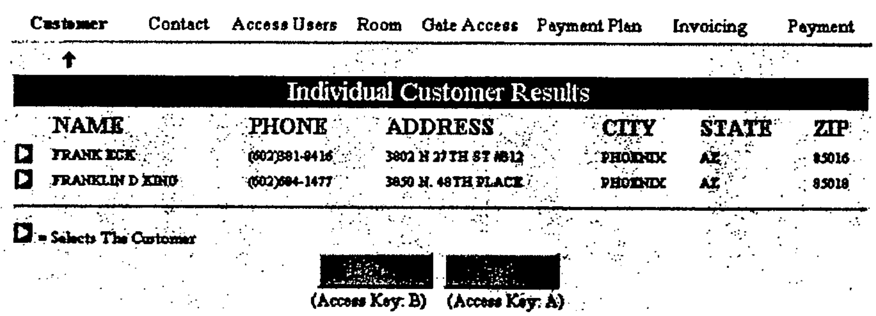
If the customer has a *unique customer ID number*, you can also type this information.

In addition, if the customer's *E-Mail address* was recorded on the last rental transaction, this information can be typed in and the customer information can be recalled.

To input search criteria and activate the search feature:

1. Click in the field the customer has given you information.
2. Type this *information*. For this example, I typed **Frank** in the FIRST NAME field.
3. Click or press ALT + F.

An INDIVIDUAL CUSTOMER RESULTS page displays all customers with the first name of Frank.



If the customer information is NOT present, click on or press ALT + A.

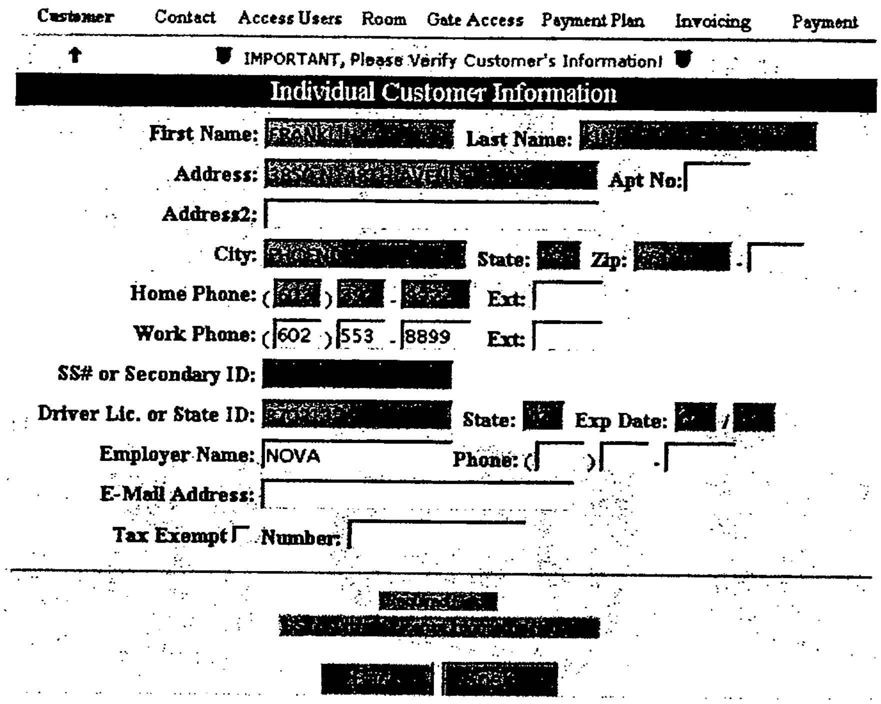
Click <u>here</u> to continue with procedure on adding a new customer.

If the customer information appears in the list, click on the blue arrow icon next to the customer's name, or press TAB until the cursor is over the blue arrow icon and press ENTER. Continue with instructions below.

If you want to return to the search function and enter new information, click or press ALT + B.

E-115

The INDIVIDUAL CUSTOMER INFORMATION page displays. Make sure the customer information is still current before continuing. Overtype any field that needs to be updated.



Since we now have a corporate-wide database, it is important to make sure the customer information is current and accurate.

To save customer information and continue with transaction:

1. Click or press ALT + X.

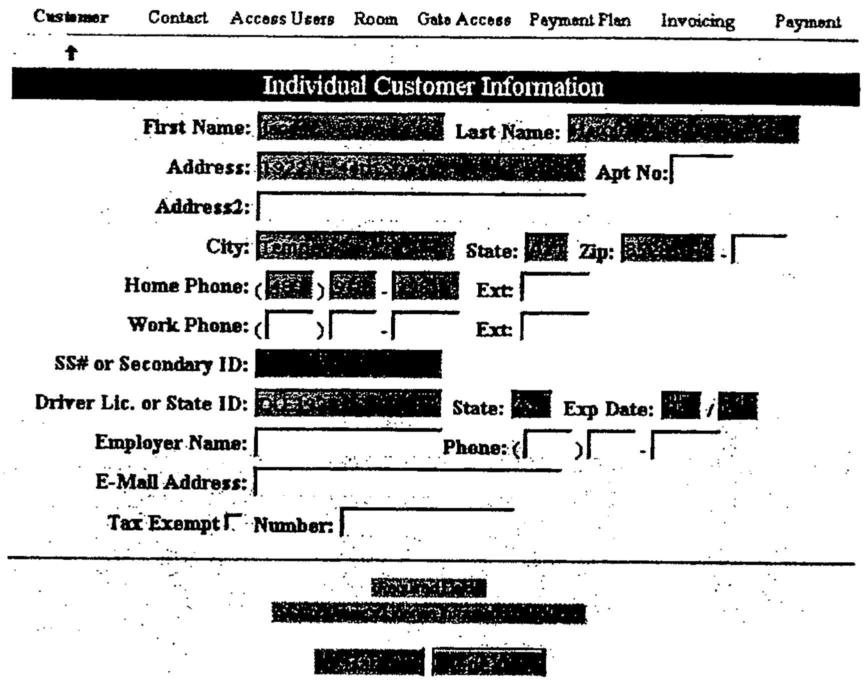
Click here to continue with the contract.

Adding a new customer

If the customer is renting from U-Haul for the first time, or you could not find the customer's information by using the advanced search function, you can add this customer to the database.

E-116

An example of the *INDIVIDUAL CUSTOMER INFORMATION* page after inputting the customer information.


Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Individual Customer Information

First Name: [redacted] Last Name: [redacted]
Address: [redacted] Apt No:
Address2:
City: [redacted] State: [redacted] Zip: [redacted] -
Home Phone: ([redacted]) [redacted] - [redacted] Ext:
Work Phone: ( ) - Ext:
SS# or Secondary ID: [redacted]
Driver Lic. or State ID: [redacted] State: [redacted] Exp Date: [redacted] / [redacted]
Employer Name: Phone: ( ) -
E-Mail Address:
Tax Exempt Number:

On this page, a field with a blue background is a required field. The customer must provide this information if they want to rent with U-Haul.

A field with a green background requires information in one of two informational fields:

If the customer wants to provide their *social security number*, a *credit card number*, or a *state* or *military identification number*, then type this information in the SS # OR SECONDARY ID field.

If the customer wants to provide their *driver's license information*, then type it in the fields provided.

To add a customer to U-Haul's database:

1. Type the *customer's information* in the appropriate field.
2. Click in the next field, or press TAB to more to the next field.
3. Repeat steps 1 and 2 until all required information is input.
4. Press Next or press ALT + X to continue.

E-117

There are several important rules governing alternate contact. These rules are needed to assure a separate contact person can be reached in case the customer is unavailable. An alternate contact cannot:

Live at the same address as the customer.

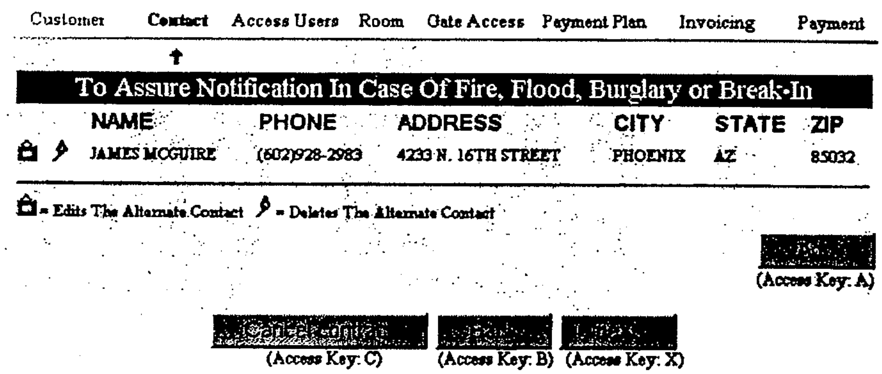
Have the same name as the person renting the room.

Have the same phone number as the customer.

To add an alternate contact:

1. Type the *proper information* in each field.
2. Press TAB or click in the next field.
3. Repeat steps 1 and 2 until all required fields have input.
4. Click or press ALT + S to continue.

The ALTERNATE CONTACT page redisplays. Notice the contact you added is now listed on this page.



Add another contact by clicking or pressing ALT + A.

Edit the existing contact by clicking next to the contact's name.

Delete the existing contact by clicking next to the contact's name.

Return to the customer page by clicking or pressing ALT + B.

Cancel the contract by clicking or pressing ALT + C.

Continue to the next page of the contract by clicking or pressing ALT + X.

E-119

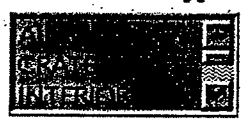
To input the room number directly:

1. Type the *room number* in the field with the title INPUT THE DESIRED ROOM #.
2. Click Add or press ALT + A.

Click here to continue with the contract.

Selecting a specific product type

Select A Product Type



Display

(Access Key: D)

To search the PRODUCT TYPE for a room:

1. If the customer wants a specific room type, but is unsure of the specific room, scroll down the list of product types.
2. Click on the PRODUCT TYPE the customer wants to rent.
3. Click on Display or press ALT + D.

All rooms that fit this product type display in a list.
If the customer does not want any of the rooms on this list, or no rooms are listed, click Back *to return to the AVAILABLE ROOMS page.*

Customer Contact Access Users **Room** Gate Access Payment Plan Invoicing Payment

Select The Desired Room From The List Below

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
115	10X10X8	INTERIOR	1 SINGLE NOCLIMATE	$48.61
23	10X10X8	INTERIOR	1 SINGLE NOCLIMATE	$48.61
458	10X10X8	INTERIOR	1 SINGLE NOCLIMATE	$48.61
4567	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95
545	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95
553	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95
566	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95
8788	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95
R0002A	10X15X8	INTERIOR	8 UPPER CLIMATE	$99.95

= Selects The Room = View Combined Room Information

Back

(Access Key: B)

E-123

Completing room input

Each room requires a BILL DATE and the adding of any services.

Customer Contact Access Users **Room** Gate Access Payment Plan Invoicing Payment

Input The Next Bill And Expected Vacate Date

Next Bill Date: [redacted] / [redacted] / [redacted]

Edit Date If Customer Request A Different Bill Date

Vacate Date: /   /

Leave Blank If Vacate Date Is Not Known

Select Services To Be Attached To This Room

ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
558	10X5X8	SC-10	1 SINGLE NOCLIMATE	50	4/26/2001	$39.95

DESCRIPTION	AMOUNT
☐ SAFESTOR $10,000	$18.00
☐ SAFESTOR $15,000	$24.00
☐ SAFESTOR $4,000	$6.00
☐ EXTENDED ACCESS	$8.00
☐ $1 MOVE IN DISCOUNT	($1.00)
☐ 20% SYSTEM MEMBER DISCOUNT	(20.00)%
☐ 50% OFF FIRST MONTH	(50.00)%
☐ ONE MONTH FREE	(100.00)%
☐ 24-HR ACCESS	$5.00

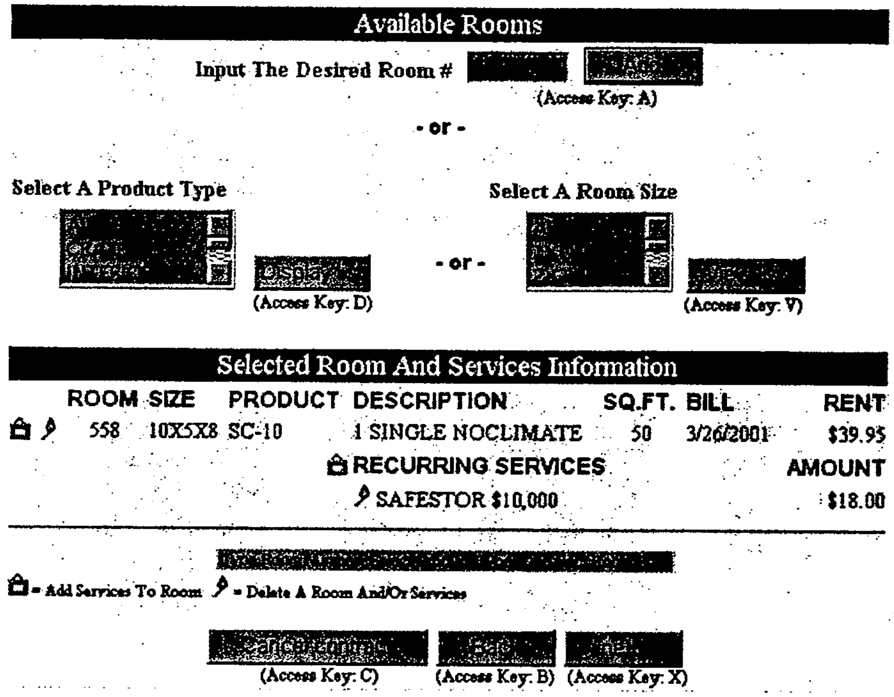
To complete room input:

1. Ask the customer if they want their next bill date to be the date shown in the NEXT BILL DATE field. If they want to change it, you must advance the date forward. The customer must pay one month, plus the number of days in advance.
   For example: The above example shows a default bill date of 4/26/01 (April 26, 2001). If the customer wants to be billed on the first of each month, change the date to 5/01/01 (May 1, 2001). The customer will be billed one month plus four days.
2. Click on the check box next to any service or discount the customer wants, or press TAB until the cursor is over the check box. Press the SPACEBAR to check the box.
3. Click Save or press ALT + S to continue.

E-126

Completing available rooms page

The AVAILABLE ROOMS page redisplays. The room and services you selected now shows under SELECTED ROOM AND SERVICES INFORMATION.



This page provides you with a way to:

Edit the room information by clicking the picture frame icon next to the room number. Click on this when you want to add more services.

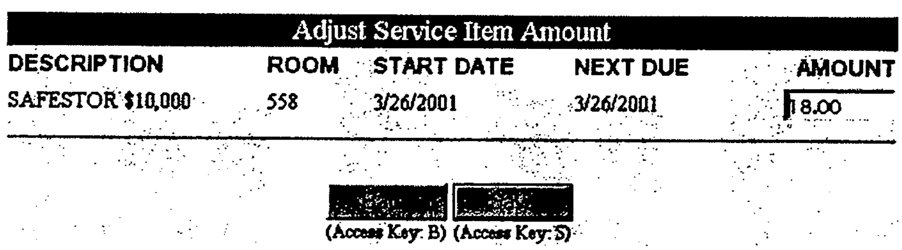
Delete the room by clicking the flaming match icon next to the room number. This removes the room and all services associated with this room.

Delete a service by clicking the flaming match icon next to the service. This removes the service from the contract.

Changing the charge amount on a service

Click on the picture frame icon next to the RECURRING SERVICES if you need to change an amount charged for services.

The ADJUST SERVICE ITEM AMOUNT page displays. All services selected for the room appear in this list.



To change an amount charged for a service:

E-127

Collecting fees due

When doing a MOVE IN without a RESERVATION, the FEES DUE page enables you to review all fees the customer is responsible for paying before they can move into the room.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
3/26/2001	558	RENT	$39.95	1.00	$3.60	$43.55
3/26/2001	558	SAFESTOR $10,000	$20.00	1.00	$0.00	$20.00

Balance Due: [illegible]

(Access Key: A) (Access Key: T)

(Access Key: L) (Access Key: M)

Reviewing fees due when moving in with a confirmed reservation

When completing a MOVE IN using a CONFIRMED RESERVATION, the FEES DUE page is different.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
		OVERPAY CREDIT			-$65.35	
3/28/2001	553	RENT	$99.95	1.00	$9.00	$108.95
3/28/2001	553	SAFESTOR $10,000	$18.00	1.00	$0.00	$18.00

Balance Due: [illegible]

(Access Key: A) (Access Key: T)

Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
CASH		/	$65.35

Total Paid: $65.35

(Access Key: L) (Access Key: M)

Since a deposit was collect on the RESERVATION, the application applies this money to the MOVE IN, and provides you with the BALANCE DUE, or REFUND DUE in cases where more money was collected on the RESERVATION than is needed on the MOVE IN.

The FEES DUE page provides the following information:

A list of charges for each room.

The balance due on this contract.

Note: On a MOVE IN, U-Haul's business rule requires that you collect the

balance due.

The buttons on this page direct you to different pages. The following information gives you a recap of what happens when you press the individual buttons.

Adding future

Take payment

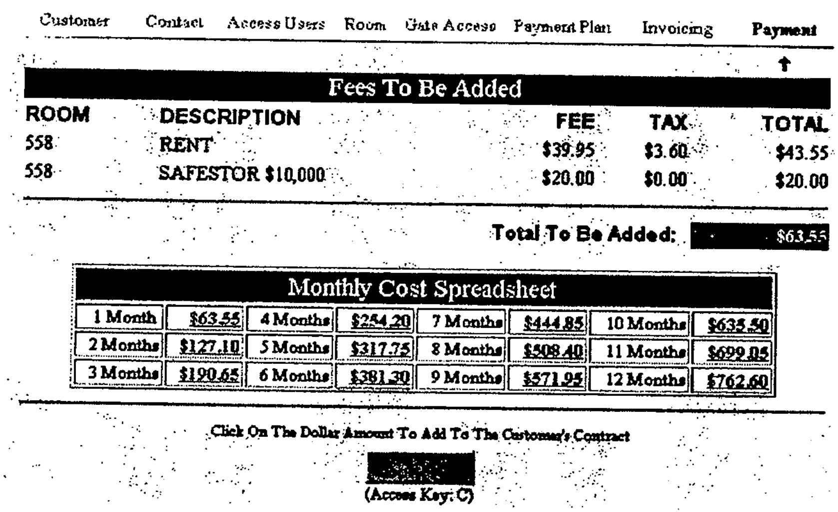
Ledger

Main

Adding future charges

Click or press ALT + A if the customer wants to pay rent into the future.

The MONTHLY COST SPREADSHEET at the bottom of the page provides you with the total due for the time noted to the left. This charge includes all rent, taxes and services associated with the room.



ROOM	DESCRIPTION	FEE	TAX	TOTAL
558	RENT	$39.95	$3.60	$43.55
558	SAFESTOR $10,000	$20.00	$0.00	$20.00

1 Month	$63.55	4 Months	$254.20	7 Months	$444.85	10 Months	$635.50
2 Months	$127.10	5 Months	$317.75	8 Months	$508.40	11 Months	$699.05
3 Months	$190.65	6 Months	$381.30	9 Months	$571.95	12 Months	$762.60

To add future months:

1. Click the underlined dollar amount next to the months the customer wants to add. For Example: If the customer wants to pay the first six months on this rental, you already have one month charge listed above, click on $317.75 to add an additional *5 months* worth of charges to this customer's contracts. The total owed is now six months.

The application goes back to the FEES DUE page and requires you select the type of payment.

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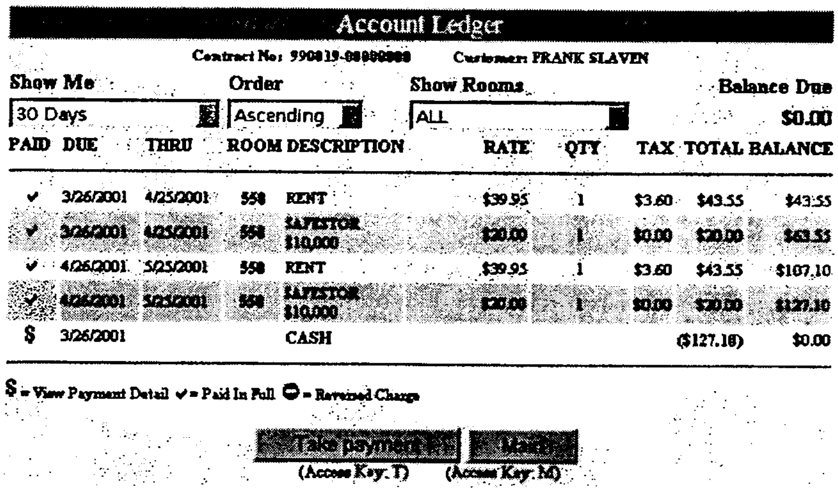
Taking payment

Review taking payment procedures by clicking here.

Viewing the ledger

The ACCOUNT LEDGER page provides you with the detail history of this customer's account.



Account Ledger

Contract No: 990819-00000000 Customer: FRANK SLAVEN

Show Me: 30 Days | Order: Ascending | Show Rooms: ALL | Balance Due: $0.00

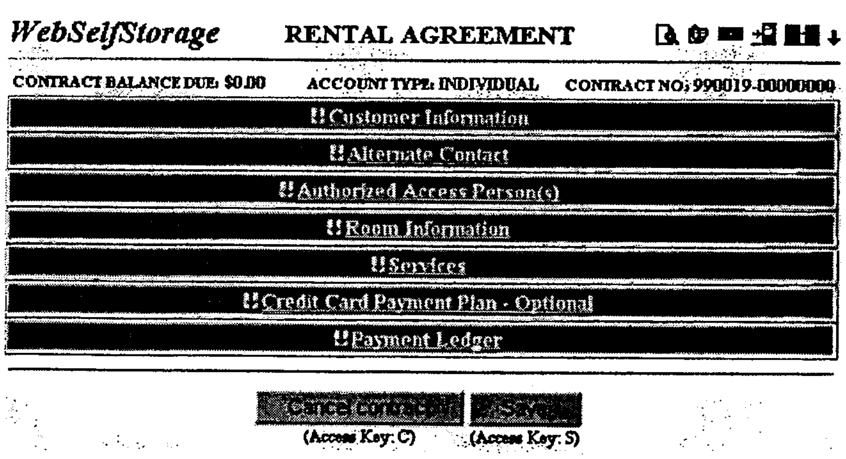
PAID	DUE	THRU	ROOM	DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE
✔	3/26/2001	4/25/2001	558	RENT	$39.95	1	$3.60	$43.55	$43.55
✔	3/26/2001	4/25/2001	558	SAFESTOR $10,000	$20.00	1	$0.00	$20.00	$63.55
✔	4/26/2001	5/25/2001	558	RENT	$39.95	1	$3.60	$43.55	$107.10
✔	4/26/2001	5/25/2001	558	SAFESTOR $10,000	$20.00	1	$0.00	$20.00	$127.10
$	3/26/2001			CASH				($127.10)	$0.00

$ = View Payment Detail ✔ = Paid In Full ⊖ = Reversed Charge

To review information about the customer's ACCOUNT LEDGER, click here.

Viewing the main contract page (rental agreement page)

The MAIN page, or RENTAL AGREEMENT page, is the page where you save the contract. Once you record the payment, this page displays.



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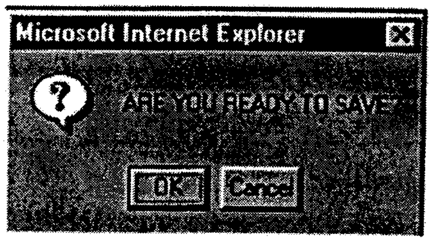
To review information about the RENTAL AGREEMENT page, click here.

Saving the contract

Once the customer pays the balance due on a MOVE IN, or makes some form of payment from within the TAKE PAYMENT selection, the save function is available.

To save a contract:

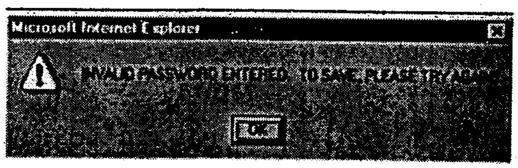
1. Click Save or press ALT + S.



A pop-up window asks if you are sure you are ready to save.

If you are ready to save the contract, click OK or press ENTER with the cursor over the OK button.

If you are NOT ready to save the contract, click on Cancel, or press TAB and then press ENTER to move the cursor over the CANCEL button and then select it.



When you select CANCEL above, a follow up message may appear informing you that an invalid password was entered. Click on OK or press ENTER to continue.

When you okay the save feature, the application displays the receipt page.

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This is an example of a customer's receipt.

Customers Receipt No:
990019-00000104-001
FRANK SLAVEN
2589 N PUEBLO DR
TUCSON, AZ 85222
(520)426-1704

Monday - 3/26/2001 - 1:29:06 PM

CMD DALLAS, 990019
920 MEYERS ROAD
GRAND PRAIRIE, TX 75050
(000)000-0000

ROOM	DESCRIPTION	THRU	PAID	AMOUNT
558	10X5X8 SC-10 1 SINGLE NOCLIMATE	4/25/2001	✔	$39.95
558	SAFESTOR $10,000	4/25/2001	✔	$20.00
558	10X5X8 SC-10 1 SINGLE NOCLIMATE	5/25/2001	✔	$39.95
558	SAFESTOR $10,000	5/25/2001	✔	$20.00
558	10X5X8 SC-10 1 SINGLE NOCLIMATE	6/25/2001	✔	$39.95
558	SAFESTOR $10,000	6/25/2001	✔	$20.00

Paid Total:	$179.85
Unpaid Total:	$0.00
Tax TX 9.00%:	$10.80
Fee Total:	**$190.65**
CASH	$127.10
CASH	$63.55
Payment Total:	**$190.65**
Account Balance:	**$0.00**

X ______________________ Customer's Signature

X ______________________ Employee's Signature


(Access Key: O)

To print this receipt, click  on the menu bar. The application sends one copy to the printer. If you need more than one copy, simply click on the print icon as many times as you need copies.

This receipt is stored on the ACCOUNT LEDGER page, and can be retrieved and reprint at any time throughout the life of this rental contract.

Make sure the customer and the employee completing the contract both sign the paper contract.

After giving a copy of the receipt to the customer and making sure you have all the copies you need for your files, click  to close the page.

To review how to retrieve a receipt after you have closed the contract, click <u>here</u>.

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Taking payment

When an existing customer either sends or comes in and makes payment on the rental, you must record this payment.

Unlike the MOVE IN contract, the application allows you to take a payment for less than the balance due. Payments are applied first to the rental amount, then to services and lastly to delinquency and other fees.

Existing Customer
Take A Payment
Move Out
View Contract
Transfer

Since this is an existing customer, click on TAKE A PAYMENT under the EXISTING CUSTOMER on the HOME page.

The search feature is exactly like the one used on the VIEW CONTRACT selection. To review procedure on finding a contract click here.

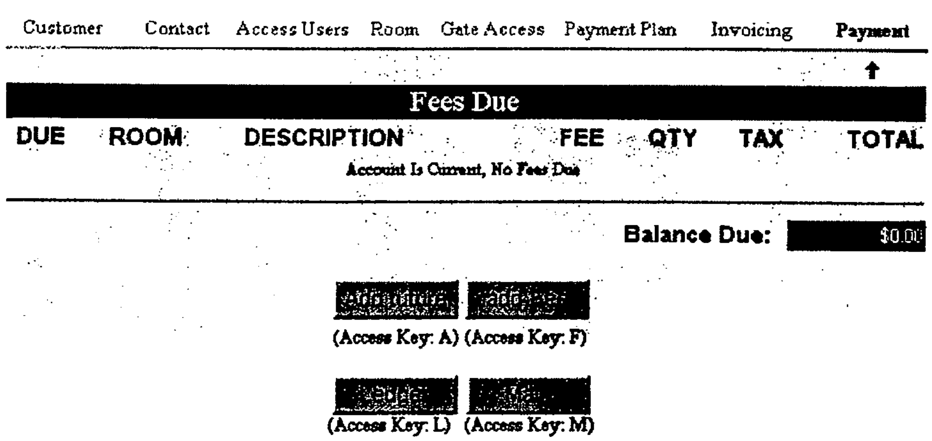
Reviewing customer status

Charges are applied to a customer's account on his or her anniversary or due date. In most cases, your customer sends in or makes payment before this anniversary date. Because of this, you need to review the customer's FEES DUE page to see if the customers due date was prior to today's date.

- If the customer's due date is in the future, then the nightly batch process has not applied current charges. You must add FUTURE CHARGES to this contract.
- If the customer's due date is before today's date, then nightly batch has applied the charges.

Add future charges

In this example, the customer is paying before his or her bill date. Notice the BALANCE DUE is zero.



When a customer is paying before his or her due date, begin by clicking or press ALT + A to add the charge that the customer is paying for. Review <u>Adding Future Charges</u>.

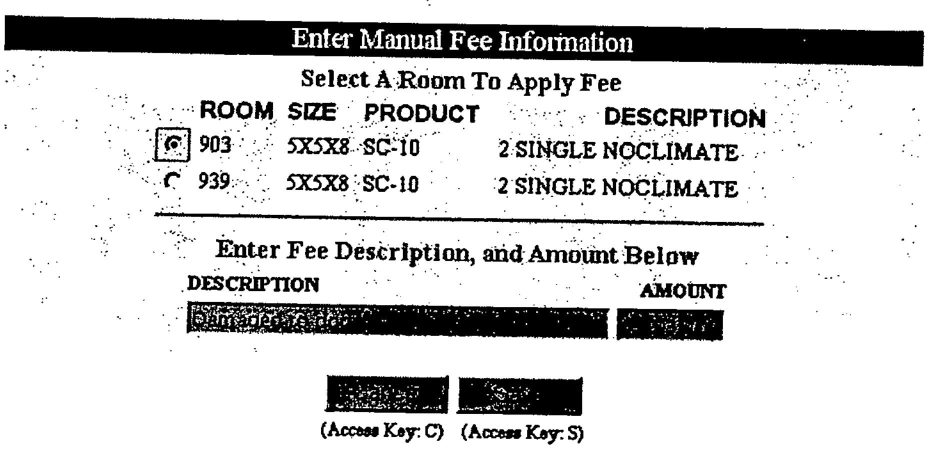
Adding a fee

On occasion, you may have to add a fee that is not listed under room charges. You can do this by clicking on or pressing ALT + F.

It is very important to understand that ADD-FEE does not replace the sales invoice screen within BEST.

Do not record the sale of locks and other resale inventory from this page. If you do, you cause incorrect inventory counts within BEST. *WebSelfStorage* does not relieve BEST inventory. Sales of locks and other resale items MUST be done from the SALES INVOICE screen within *BEST*.

If the customer has more than one room, the application provides you with a page to select the room you want the fee attached to.



To add a fee when there is more than one room:

1. Click on the radio button beside the room you are adding this fee.
2. Click in the DESCRIPTION field.
3. Type the fee description.
4. Press TAB.
5. Type the amount of this fee.
   Note: No tax is assessed on these fees. Make sure you include the total amount including tax when applicable.

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Charge already added

In this example, the customer's due date is the 13th of the month. The rent charge was applied and because the customer is late, delinquency fees are included in the balance.

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
3/13/2001	939	RENT	$19.99	1.00	$1.60	$21.59
3/13/2001	903	RENT	$19.99	1.00	$1.60	$21.59
3/16/2001	939	1ST STAGE DELINQUENCY FEE	$15.00	1.00	$0.00	$15.00
3/16/2001	903	1ST STAGE DELINQUENCY FEE	$15.00	1.00	$0.00	$15.00
3/26/2001	939	2ND STAGE DELINQUENCY FEE	$15.00	1.00	$0.00	$15.00
3/26/2001	903	2ND STAGE DELINQUENCY FEE	$15.00	1.00	$0.00	$15.00

Balance Due: $103.1[illegible]

(Access Key: A) (Access Key: F) (Access Key: T) (Access Key: W)

(Access Key: L) (Access Key: M)

For a payment, you have several options:

- Record a customer's payment by clicking on or pressing ALT + T. Continue by reviewing **Payments**.
- Waiver a fee by clicking on the yellow icon or pressing TAB until the cursor is over this icon. Once the cursor is over the icon, press ENTER to select. Continue by reviewing **Recording waivers.**
- Write-off any existing charges by clicking on or pressing ALT + W. Continue by reviewing **Writing off a charge**.
- Review the customer's history by clicking on or pressing ALT + L. Continue by reviewing **Account Ledger**.
- Go to the RENTAL AGREEMENT page by clicking on or pressing ALT + M. Continue by reviewing **Rental Agreement**.

NOTE: Always, complete waivers and write offs before taking payment.

After recording all payments, write-offs, and waivers, save the contract. Continue by reviewing **Saving The Contract**.

Recording waivers

Always complete waivers before collecting payment.

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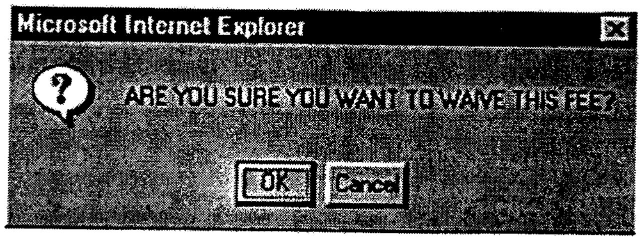
When you click on ●, the application asks if you are sure.



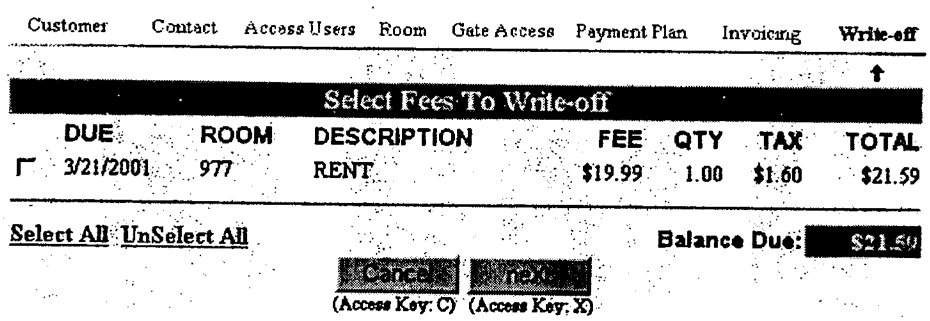
Click OK or press ENTER if you want to remove this fee.

Click Cancel or press TAB, ENTER if you want to cancel and leave the fee as is.

Writing off a charge

Always complete write offs before collecting payment.

The application displays all unpaid charges and services.



You can write-off charges in several ways:

- If you want to write-off the complete list of charges, click on Select All. If you select all by mistake, you can click UnSelect All to uncheck all boxes.
  Note: If you select more than one charge, you will not be able to adjust the amount of the write-off. When only a portion of several charges needs to be written off, complete the write-off of each charge separately. To do this, check the box next to one of the charge. Click the next button and complete the next page. Once the write-off of the first charge is done, click on the write-off button again and select the other charge.
- If you want to write-off selective charges, click on the check box next to the charges you want to write-off. You can also press TAB until the cursor is over the check box. Press the SPACEBAR to check the box.

Click on neXt or press ALT + X to continue.

Moving out

When a customer is vacating their storage room, complete a move out contract.

A move out contract is also necessary after the auction process to close the customer's contract and return the room to available status.

There are three different move out scenarios:

- A customer owes money
- A customer is paid up
- A customer is paid in advance.

Within each move out scenario, you may also charge the customer additional fees for such things as cutting the lock, cleaning fees, and/or dumpster fees.

Taking care of balances owed

If the customer has outstanding charges and fee, complete TAKE A PAYMENT contract before doing the MOVE OUT.

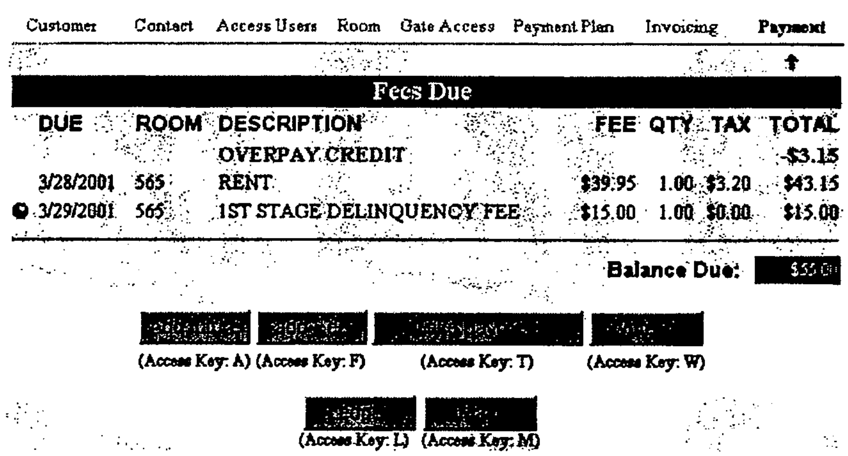
To collect on balances owed or write-off charges on a contract:

1. Click on TAKE A PAYMENT from the HOME PAGE under EXISTING CUSTOMERS.

2. Recall the contract. Review procedure on VIEWING A CONTRACT already covered within Customer contracts.

   When you get to the FEES DUE page, click to return to this page.

The FEES DUE page shows all rent, services, and fees not yet paid.



To waiver a delinquency fee:

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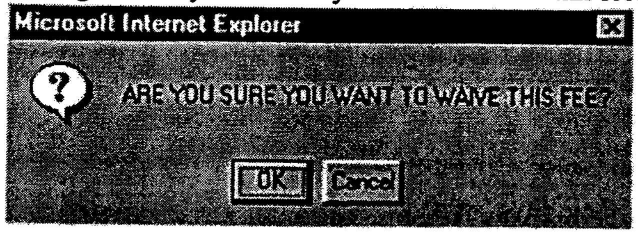
1. Click on the yellow bullet icon next to the delinquency fee. A pop-up message asks if you are sure you want to waiver this fee.



2. Click OK to remove the fee, or Cancel to return to the page without removing the fee.

To write-off existing charges:

1. Click on Write-off.
2. Review write-off procedure.

Waivers and write offs must be done before taking payment.

To collect payment:

1. Click on Take Payment.
2. Review <u>payment</u> procedure.

To complete the contract:

1. Review <u>completing contract</u> procedures.

Finishing the move out

Once all existing rental fees, services and delinquencies are taken care of within the TAKE A PAYMENT contract, you are ready to complete the move out.

Existing Customer

<u>Take A Payment</u>
<u>Move Out</u>
<u>View Contract</u>
<u>Transfer</u>

Start the move out by clicking on the corresponding name, MOVE OUT, under EXISTING CUSTOMER.

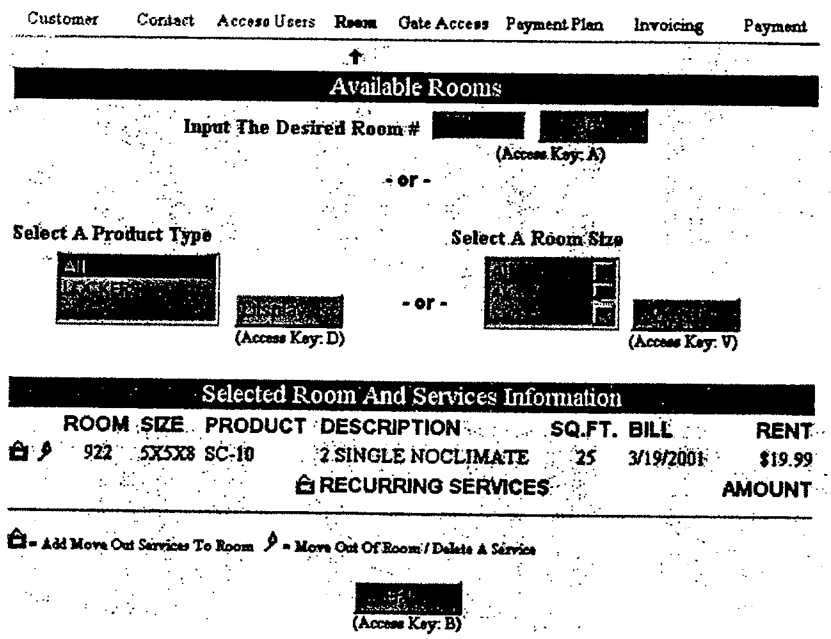
You can also press TAB until the cursor is over MOVE OUT, and then press

ENTER to select.

Recalling a contract uses the same procedure as VIEWING A CONTRACT already covered within customer contracts. Click here if you need to review these procedures. Follow that procedures until the AVAILABLE ROOMS page displays, return to these instructions by clicking on .

Viewing available rooms move out page

The AVAILABLE ROOMS MOVE OUT page is slightly different from the MOVE IN or TAKE A PAYMENT page. Notice the picture frame icon next to the room number. Click on this icon to start the move out process.



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A list of charges associated with a move out contract display. Click on any of the services that you want to charge the customer. Click [illegible] *to continue.*

Select Any Move Out Service Fees That Apply To Room 975

ROOM	SIZE	PRODUCT	DESCRIPTION	SQ.FT.	BILL	RENT
975	5X5X8	SC-10	2 SINGLE NOCLIMATE	25	5/3/2001	$19.99

DESCRIPTION	AMOUNT
☑ CLEANING	$25.00
☐ LOCK REMOVAL	$15.00
☐ SALE ADVERTISING	4.00%
☐ $1 MOVE IN DISCOUNT	($1.00)
☐ $5 OFF FIRST MONTH	($5.00)
☐ 1 MONTH FREE	(100.00)%
☐ 20% SYSTEM MEMBER	(20.00)%
☐ 50% OFF FIRST MONTH	(50.00)%
☐ TEST	(3.00)%
☐ TEST AGAIN	(4.00)%
☐ 24-HR ACCESS	$5.00

(Access Key: B) (Access Key: X)

If you selected additional service fees, continue below.

If you did not select additional service fees, click <u>here</u> to view procedure on completing the move out with no additional fees.

Completing contract with additional service fees

The FEES DUE page displays.

Customer   Contact   Access Users   Room   Gate Access   Payment Plan   Invoicing   **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
4/3/2001	975	CLEANING	$25.00	1.00	$0.00	$25.00

Balance Due: $25.00

(Access Key: A) (Access Key: F) (Access Key: T) (Access Key: W)

(Access Key: L) (Access Key: M)

To collect payment:

1. Click on [illegible]
2. Review <u>payment</u> procedure.

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After taking a payment, the application returns to the FEES DUE page. Click on Main *to displays the RENTAL AGREEMENT page.*

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
		Account Is Current, No Fees Due				

Balance Due: $0.00

(Access Key: A) (Access Key: F)

Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
CASH		/	$23.00

Total Paid: $23.00

(Access Key: L) (Access Key: M)

If the customer wants a printout of their rental history, and/or you would like a recap for your files:

1. Click [illegible].
2. Click [illegible]. on the LEDGER page.
3. After printing ledger information, click Main to go to the RENTAL AGREEMENT page.

To complete the MOVE OUT, click on the ROOM INFORMATION link.

WebSelfStorage **RENTAL AGREEMENT**

CONTRACT BALANCE DUE: $0.00 ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000071

- Customer Information
- Alternate Contact
- Authorized Access Person(s)
- Room Information
- Services
- Credit Card Payment Plan - Optional
- Payment Ledger

(Access Key: C) (Access Key: S)

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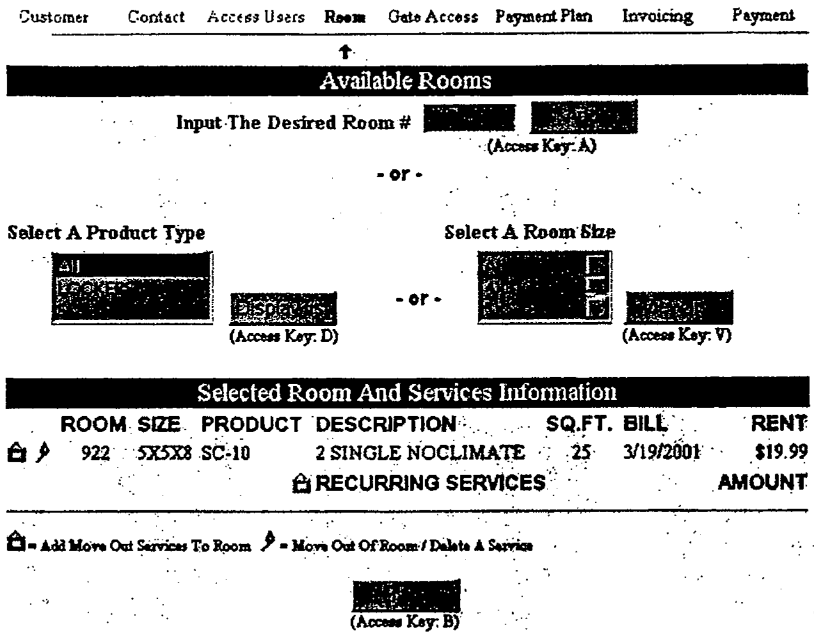
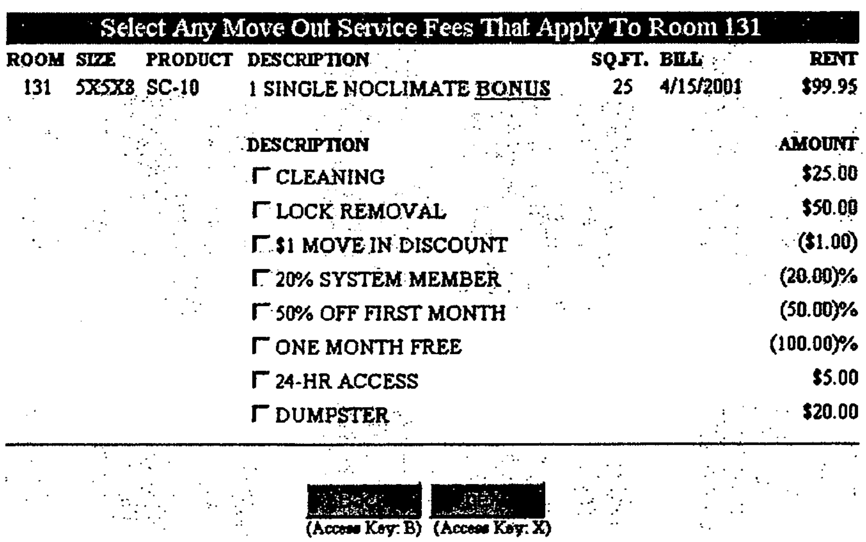
The AVAILABLE ROOMS MOVE OUT page redisplays. Now you are ready to complete the move out. Click on the picture frame icon next to the room number. Continue with procedures below.



Completing the contract with no additional service fees

On the SELECT ADDITIONAL SERVICE FEES page, if you do not check any of the boxes, and the customer is current, when you click [next] to continue....



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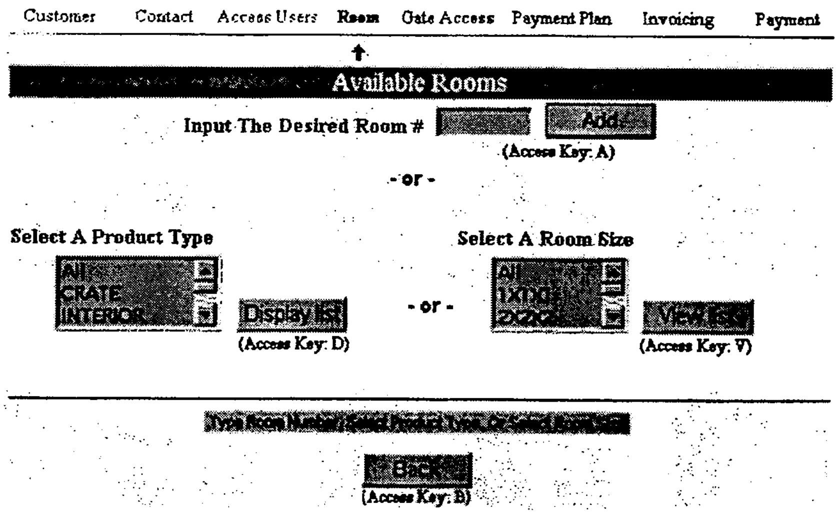
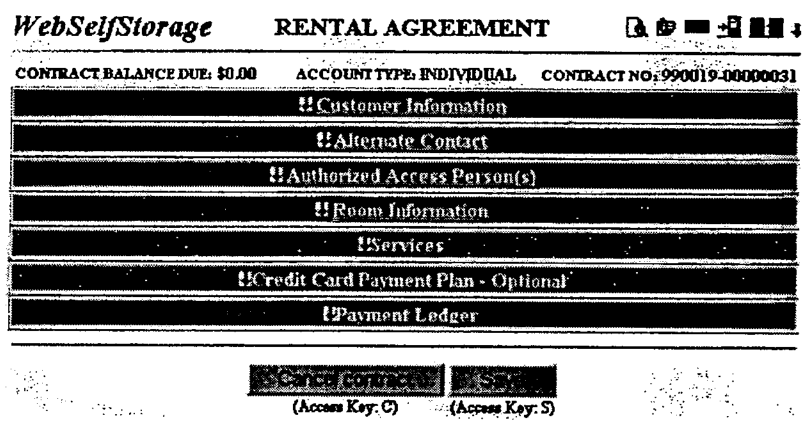
.... the AVAILABLE ROOMS page redisplays. Since the customer is moving out of the room, all you need to do is click Back to continue.



The RENTAL AGREEMENT page displays. Click the down arrow ↓ next to ROOM INFORMATION. Notice there are no rooms associated with this contract.



Notice that the SERVICES, CREDIT CARD PAYMENT PLAN, and PAYMENT LEDGER are not underlined. You can no longer access these pages.

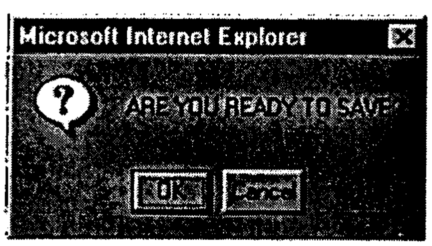
To save the MOVE OUT, click Save.

or

To cancel the MOVE OUT, click Cancel contract.

When you save a contract, the application displays a message asking if you are sure.

Click OK *if you are ready to save.*



Click Cancel *if you want to return to the contract.*

Moving out with advance rent paid

In some case, the customer may have paid a few months in advance. According to U-Haul's rental agreement, all unused full-months of rent and services must be refunded to the customer.

Existing Customer

Take A Payment

Move Out

View Contract

Transfer

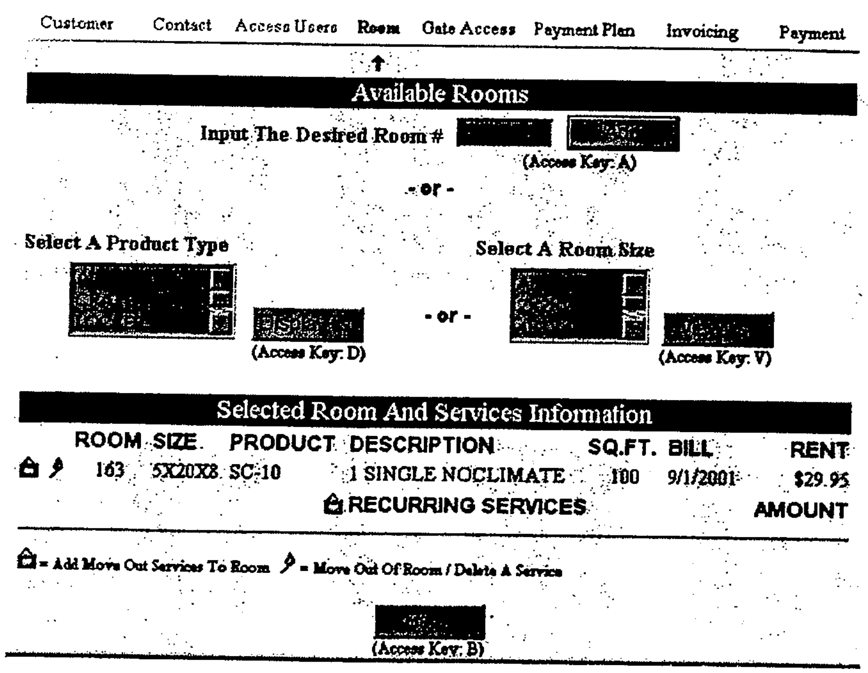
Start the move out by clicking on the corresponding name, MOVE OUT, under EXISTING CUSTOMER.

You can also press TAB until the cursor is over MOVE OUT, and then press ENTER to select.

Recalling the contract uses the same procedure as VIEWING A CONTRACT already covered within customer contracts. Click here if you need to review these procedures. Follow that page's procedures until the AVAILABLE ROOMS page displays, return to these instructions by clicking on .

The AVAILABLE ROOMS page displays with the room information at the bottom of the page.

Click on the flaming match icon to the left of the room number.



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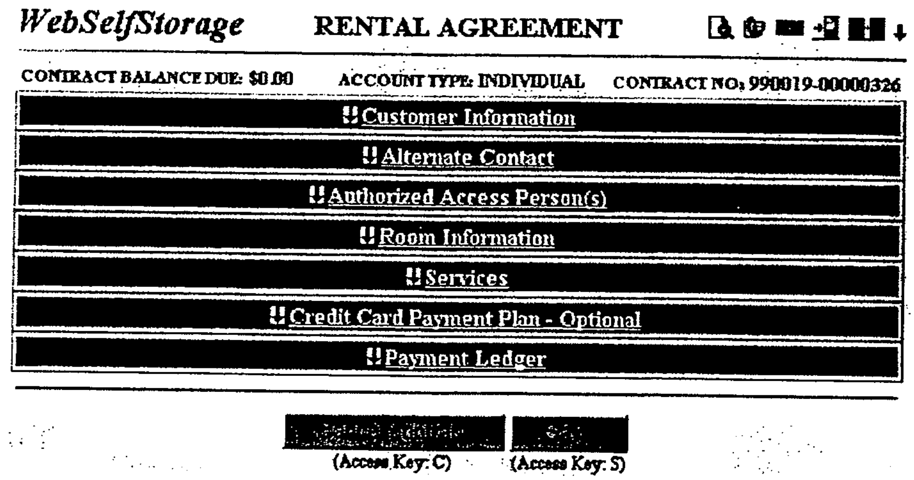
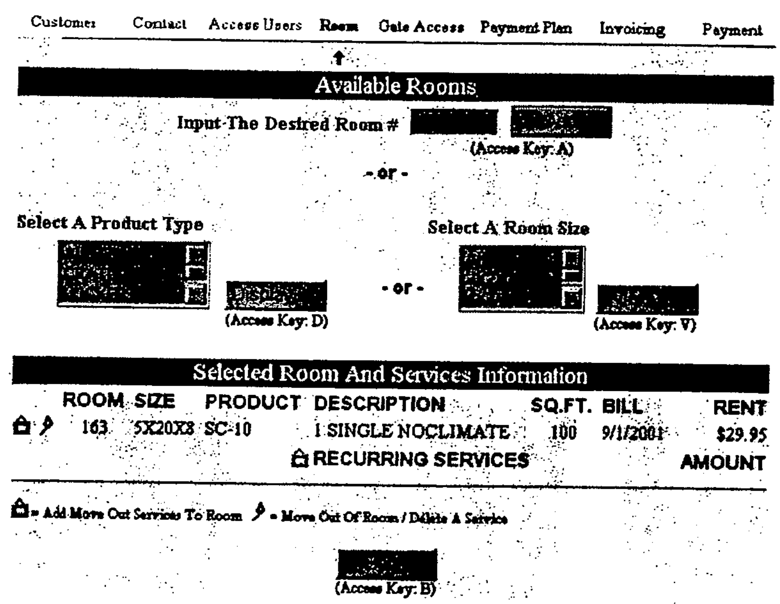
After saving the customer's payment, the RENTAL AGREEMENT page displays. Now you are ready to complete the actual move out. Click on the move out icon at the top, right-corner of the page.

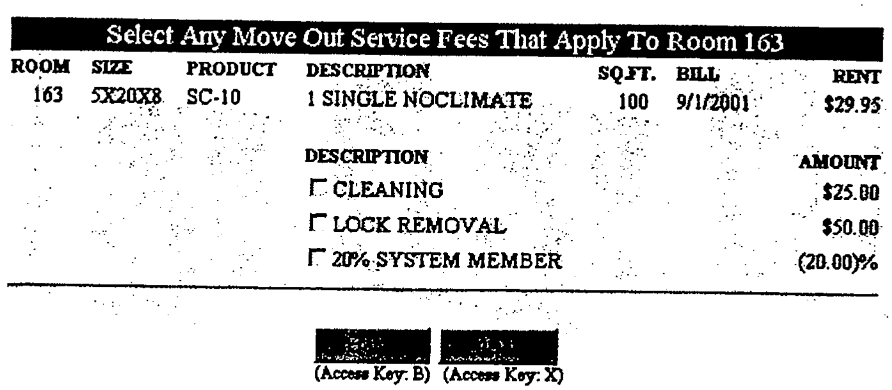


The AVAILABLE ROOMS page redisplays with the room information at the bottom of the page.

Click on the flaming match icon to the left of the room number.



This takes you back to the page where you added move out charges. Since you have already added these charges, click on Next without checking any box.



This AVAILABLE ROOMS page redisplays. This page redisplays for those

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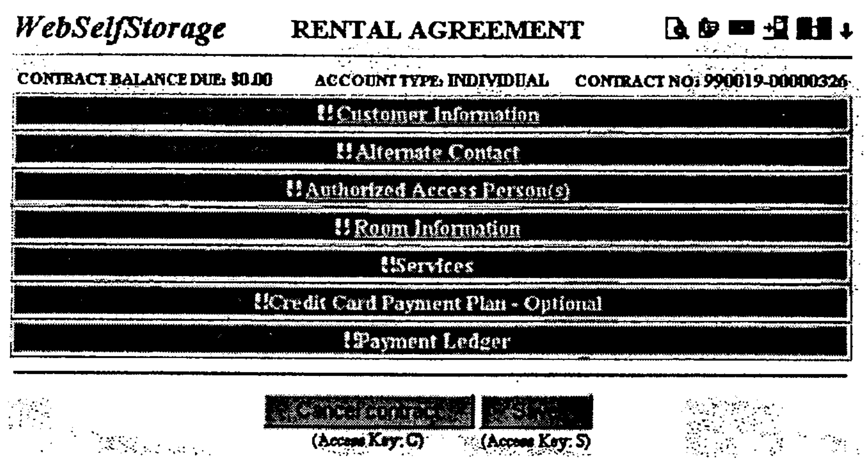
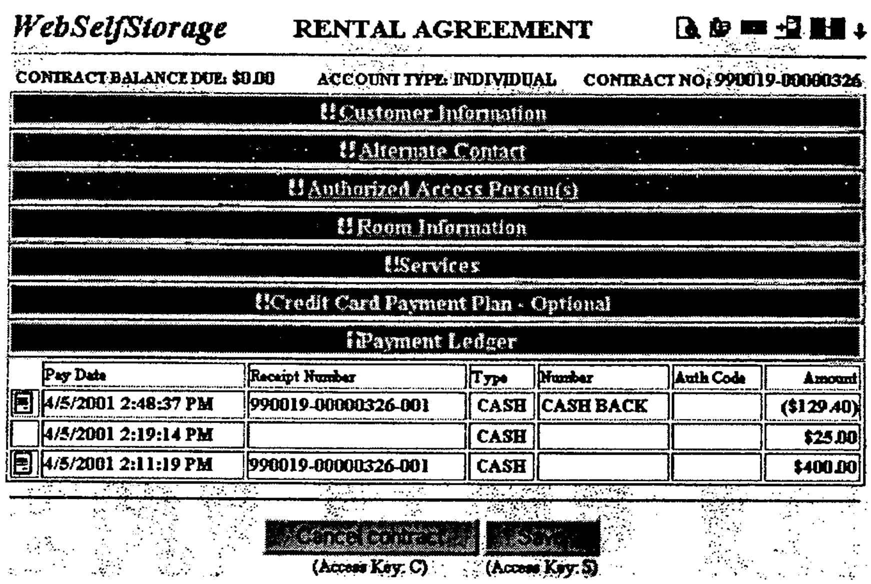
Click neXt to continue.

The RENTAL AGREEMENT page displays.



If you need to see the amount of money to refund, click on the ↓ next to PAYMENT LEDGER. This displays the history of payments. The first item on this list provides you with the balance of money you should return to the customer.



Click on Save or press ALT + S to save the contract.

FOR CASH PAYING CUSTOMERS -- When a customer is charged additional fees on a move out, and at the same time is due a refund, you do not have to collect the money from the customer for the charges and then turn around and refund the money.

When you get to the FEES DUE page, record the payment, but do not collect money from the customer. Make a note of the amount the customer owes on a

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piece of paper.

When you get to the RENTAL AGREEMENT page above, write down the amount you need to refund the customer. Subtract the charge amount from the refund amount and give the customer back the difference.

The only time you will have to collect money from the customer on additional charges is when the customer is using their credit card, or when you are refunding the customer by marketing company check. When this occurs, you will need to collect the additional charge from the customer. Explain to the customer that the marketing company check is for the full refunded amount.

At a future date, this programming glitch will be corrected, but for know it is the only way around balancing of money on a move out with a customer refund.

A receipt is not generated for a move out.

Transfer Between Rooms

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Transferring between rooms

There are times when a customer requests a new room because the old room no longer fits his or her needs.

Occasionally, a room may be damaged and the customer requests a new room to assure the safety of his or her goods.

On these occasions, a transfer contract can be done to move the customer out of his or her old room and into another room of a same or different size.

A customer cannot transfer between rooms if he or she is behind in their rental payment.

Click on TRANSFER on the HOME page. It is located under EXISTING CUSTOMER.

Existing Customer

Take A Payment

Move Out

View Contract

Transfer

Search for the customer using the CONTRACT/RESERVATION SEARCH ENGINE page. Click here to review the customer search feature.

Click on the blue arrow icon next to the room the customer is moving out of.

Customer Contact Access Users Room Gate Access Payment Plan Invoicing Payment

Select A Room And Any Service(s) To Transfer Out

	ROOM	SIZE	PRODUCT	DESCRIPTION	BALANCE	RATE
◘	118	5X5X8	SC-10	1 STREET NOCLIMATE	$0.00	$99.95

$ = Takes Payment ◘ = Selects Room

(Access Key: M)

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Click on the blue arrow icon ▶ next to the room the customer is moving into.

Customer Contact Access Users **Room** Gate Access Payment Plan Invoicing Payment

Select A Room From The List Below To Transfer In

Transfer Out Room

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
118	5X5X8	SC-10	1 STREET NOCLIMATE	$99.95

Transfer In Rooms Available

	ROOM	SIZE	PRODUCT	DESCRIPTION	RATE
▶	11	7X27X7	WAREHOUSE	1 STREET CLIMATE	$19.99
▶	5522	25X25X25	SC-10	5 COVERED CLIMATE	$40.00
▶	ROD2	5X5X8	SC-10	2 STREET NOCLIMATE	$19.99

▶ = Selects Room

(Access Key: B)

A recap page shows the ADJUSTED ROOM CREDIT on the room the customer is moving out of, as well as the ADJUSTED ROOM CHARGE on the room the customer is moving into. The balances are pro-rated.

Customer Contact Access Users **Room** Gate Access Payment Plan Invoicing Payment

Balance of Transfer Out And Transfer In Rooms

Transfer Out Room

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE	QTY	TAX	ADJUSTED CREDIT
118	5X5X8	SC-10	1 STREET NOCLIMATE	$99.95	0.68	$5.44	($73.41)

Adjusted Room Credit: ($73.41)

Transfer In Room

ROOM	SIZE	PRODUCT	DESCRIPTION	RATE	QTY	TAX	ADJUSTED CHARGE
346	5X20X8	SC-10	1 STREET NOCLIMATE	$29.95	0.68	$1.63	$22.00

Adjusted Room Charge: $22.0

Credit Due: ($51.4)

- Apply Credit To New Room
- Give Cash Back to Customer

When there is CREDIT DUE, click on either APPLY CREDIT TO NEW ROOM or GIVE CASH BACK TO CUSTOMER.

APPLY CREDIT TO NEW ROOM -- adds the credit to the new room advancing the paid through date if the credit is more than the monthly charge on the new room.

GIVE CASH BACK TO CUSTOMER – refunds the customer the credit due.

The FEES DUE page shows the amount of money owed, or an OVERPAY CREDIT. Collect payment when necessary. Once done, click **Main** *to go to the RENTAL AGREEMENT page.*

Customer | Contact | Access Users | Room | Gate Access | Payment Plan | Invoicing | **Payment**

Fees Due

DUE	ROOM	DESCRIPTION	FEE	QTY	TAX	TOTAL
		OVERPAY CREDIT				-$19.06

Account Is Current, No Fees Due

Balance Due: ($19.[illegible]

● = Waivers Fee

Add future | add Fee

(Access Key: A) (Access Key: F)

Payments Collected

TYPE	NUMBER	EXP. DATE	AMOUNT
TRAN		/	$73.41

Total Paid: $73.41

Ledger | Main

(Access Key: L) (Access Key: M)

Click on **Save** *to continue. Review saving contract procedure by clicking* **here**.

WebSelfStorage **RENTAL AGREEMENT**

CONTRACT BALANCE DUE: ($19.06) ACCOUNT TYPE: INDIVIDUAL CONTRACT NO: 990019-00000227

- Customer Information
- Alternate Contact
- Authorized Access Person(s)
- Room Information
- Services
- Credit Card Payment Plan - Optional
- Payment Ledger
- Notes

Cancel contract | Save

(Access Key: C) (Access Key: S)

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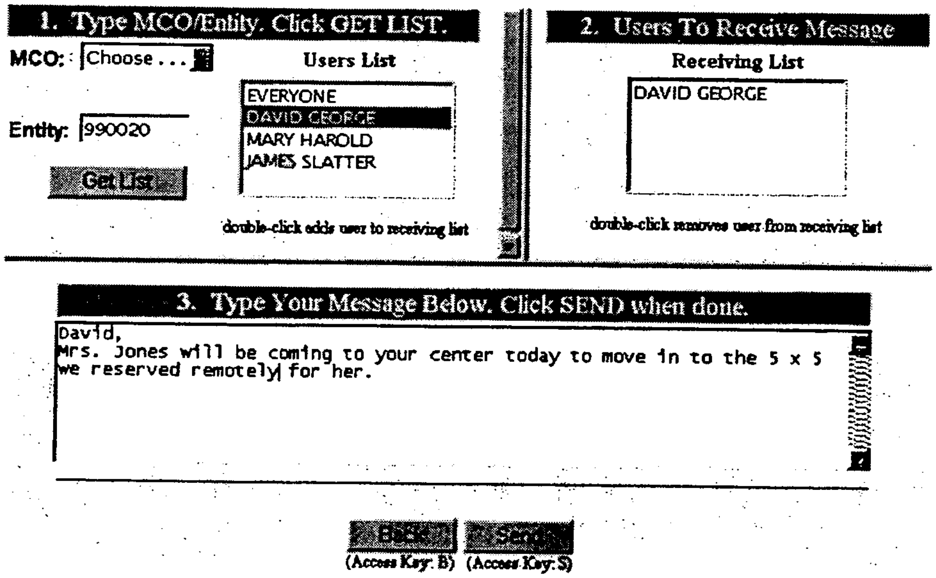
Double-click on a person's name in the USERS LIST to move them to the RECEIVING LIST.

Double-click a person in the RECEIVING LIST to move them back to the USERS LIST. All person in the RECEIVING LIST will receive your message.

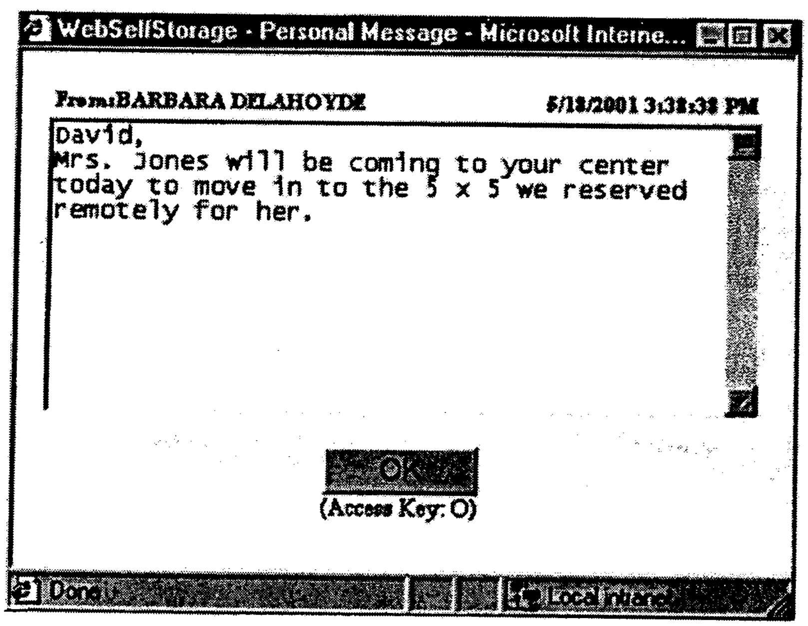


Note: There is no keyboard equivalent when moving a person between the USERS LIST and RECEIVING LIST.

Type your message in the space provided. Click Send *to forward the message to all persons listed under RECEIVING LIST.*

To check for messages, log out of the application. When you log back in, the message sent to you displays.

If you have multiply messages, the latest one sent displays the first time you log out and in.



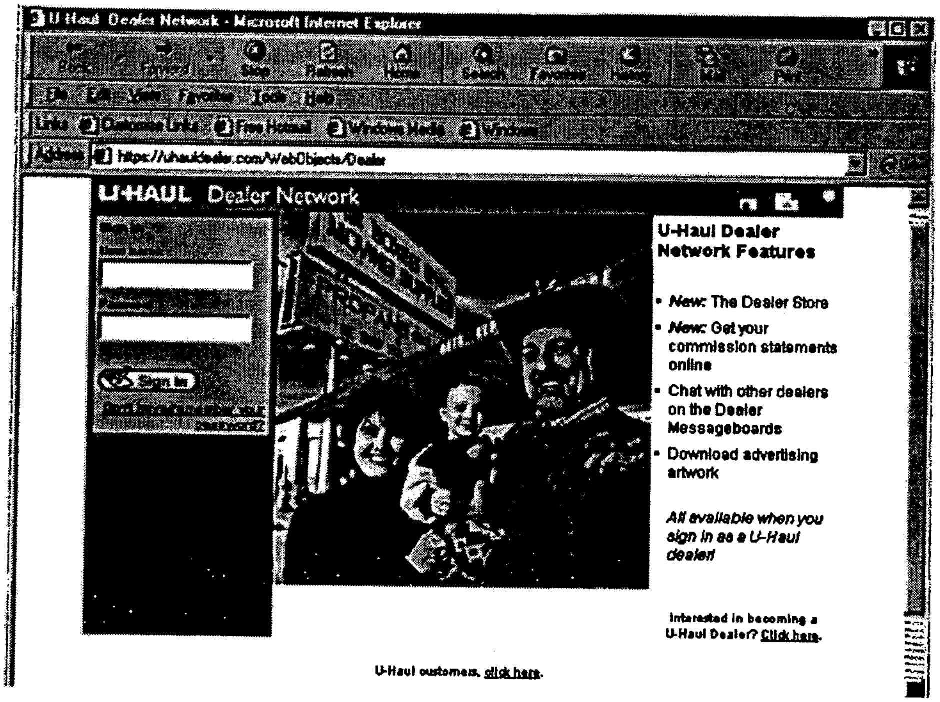
To check for multiple messages, continue to log out and in until no message displays.

U-Haul Dealer

The dealer network provides you with information about your dealership and other dealerships across the nation.

Type your USER NAME and PASSWORD to access this application.

If you have problems access this application, click in the upper, right corner of this page. This takes you to a page with phone numbers and e-mail addresses of the areas responsible for this web page.



U-Haul GM

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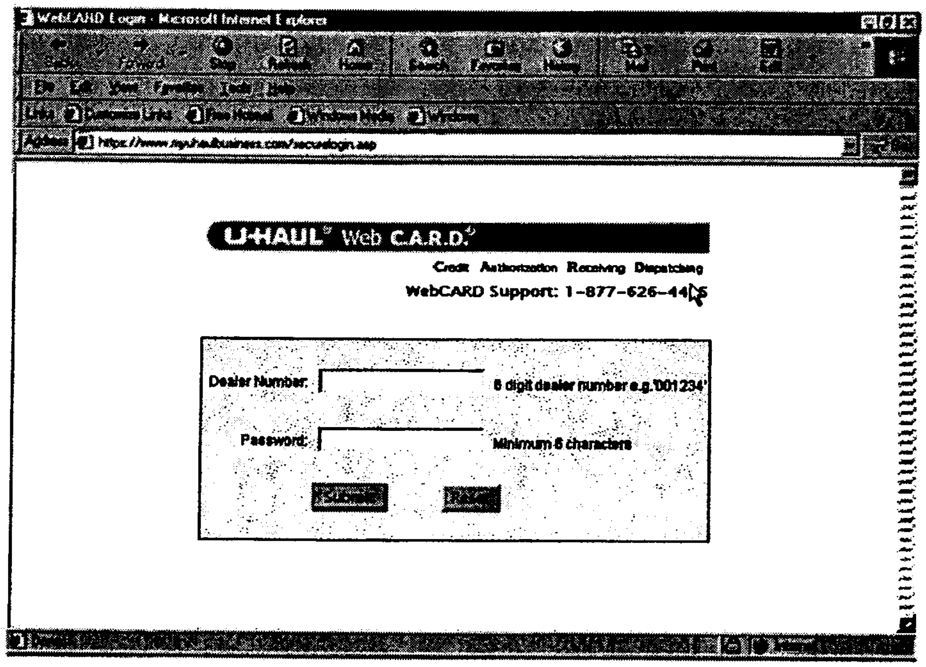
WebCard

WebCard is the truck and trailer rental application used by independent dealers.

Type in your dealer number and password.

If you experience difficulties with this application call the WebCARD Support phone number shown on this log in page.



<u>*Room Truck Equivalency Chart*</u>

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Room/Truck Equivalency Chart

The ROOM/TRUCK EQUIVALANCY CHART provides you with a cross-reference showing what truck, trailer or storage room to recommend to a customer according to the size of their current residence.

Room/Truck Equivalency Chart				
Bedrooms/Rooms	**Truck**	**Trailer**	**Cubic Feet**	**Storage**
Misc.	-	4X6 / 4X8	103-142	5x5
1-2 Rooms/Studio	-	5X8 / 5X10	208-230	5x8
1 Bedroom/3-4 Rooms	10' / 14'	6X12	368-669	5x10
2 Bedroom/4-5 Rooms	17'	-	849	10x10
3 Bedroom/5-6 Rooms	24'	-	1350	10x15
4 Bedroom/7-8 Rooms	26'	-	1538	10x20

(Access Key: B)

Reports

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Creating Reports

WebSelfStorage provides you with a variety of reports to help you maintain and management your storage facility. These reports are available to you any time and reflect the current status of your facility.

Viewing Report List

To go to the REPORT LIST page:

1. Click on the REPORT LIST located in the right side of the page under the title LOOKUPS.

Lookups

Report List

The STORAGE REPORT LIST page contains a list of hypertext links to the various reports.

To select a report using the mouse:

1. Move the cursor over the report you want to view.
2. Click the left mouse button.

To select a report using the keyboard:

1. Press TAB until the cursor is over the report you want to view.
2. Press ENTER to select.

Auto Payment Customers
Cash Drawer Summary
Collection Worksheet
Downloaded Reservations
Expiring Credit Cards
Facility Utilization Summary
Failed Auto Payments
Invoicing Customers
Move Out
Nightly Batch Letters
Nightly Batch Status
No Show Reservations
Rent Roll
Rooms Available
SAFESTOR Coverage
Security Access Codes
Security Access In/Out
Unit Mix
Unit Price List
Walk Around

The remaining instructions on this page provide you with information on viewing and printing these individual reports:

Auto Payment Customers

Cash Drawer Summary

Collection Worksheet

Downloaded Reservations

Expiring Credit Cards

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Facility Utilization Summary

Failed Auto Payments

Invoicing Customers

Move Out

Nightly Batch Letters

Nightly Batch Status

No Show Reservations

Rent Roll

Rooms Available

SAFESTOR© Coverage

Security Access Codes

Security Access In/Out

Unit Mix

Unit Price List

Walk Around

Maintain Walk Around Sequence

Reviewing auto payment customers

The AUTO PAYMENT CUSTOMERS report provides you with a list of customers who authorize the use of their credit cards to make a payment on their monthly rental.

Auto Payment Customers

Entity: 723025 — Date: 3/13/2001

CUSTOMER NAME	RM #	PHONE NO	ALT PHONE NO	CARD NUMBER	EXP DATE
YARCHO, K.C	1503	(602)906-9688	(480)312-5810	4321123123123	10/03
				Grand Total:	1

(Access Key: B)

The AUTO PAYMENT CUSTOMERS page gives you the detail for each customer who authorized the use of their credit card to make payments. Review this report when you need to get the credit card or phone number for a particular customer. The report provides the customer's name, rented room number, customer and alternate contact's phone numbers, the customer's credit card number, and the expiration month and year on this credit card.

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Printing a report

Once you have a report on the screen, you can send it to the printer by following these instructions:

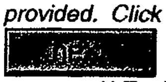
To print a report:

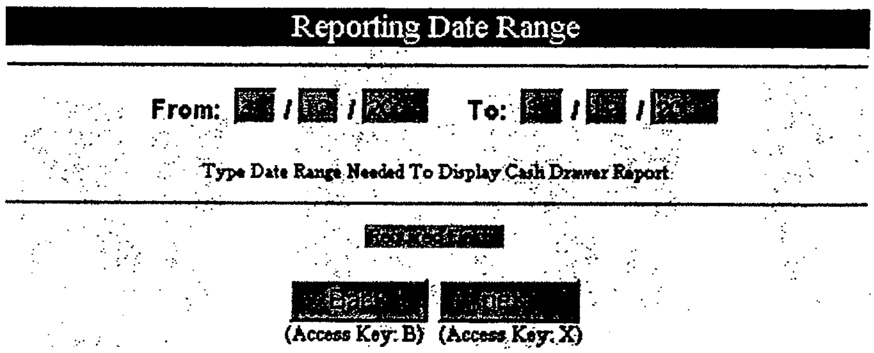
1. Make sure the report page is visible and the window is active.
2. Click on the  on the menu bar at the top-right corner of the page. This will send the report page to the printer.

To return to the REPORT LIST page:

1. Click on  or press ALT + B.

Reviewing cash drawer summary

A CASH DRAWER SUMMARY report can be viewed for any time period. Type the beginning (FROM) and ending (TO) date in the fields provided. Click  *or press ALT + X to continue.*



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The CASH DRAWER SUMMARY report recaps all transactions completed for the dates you entered on the previous page. This report provides you with the names of the system members who completed the contracts, the entity number, the contract number and the type of payment collected. Analyze this report when you are having trouble balancing your storage cash drawer in BEST.

Cash Drawer Summary

Entity: 883049 **Date: 3/11/2001-3/11/2001**

SYSTEM MEMBER	ENTITY	CONTRACT NUMBER	PAYMENT TYPE	TOTAL
DUPES, GEORGE	883049			
		883049-00000076	CASH	$30.55
		883049-00000132	CASH	$45.85
			Payments Subtotal	***$76.40***
			Write-Offs Subtotal	***$0.00***
DUPES, PAM	883049			
		883049-00000025	PERSONAL CHECK	$45.55
		883049-00000300	VISA	$81.55
			Payments Subtotal	***$127.10***
			Write-Offs Subtotal	***$0.00***
			Payments Grand Total	**$203.50**
			Write-Offs Grand Total	**$0.00**
			Combined Grand Total	**$203.60**

Click here to view instructions on report printing

Reviewing collection worksheet

Before viewing the COLLECTION WORKSHEET, you can input a range of days late you want to see.

Collection Worksheet

From Days Late: ____ **To Days Late:** ____

Type From/To Days Late And Click NEXT To View A Specific Collection Worksheet Report
Leave Fields Blank And Click NEXT To View A Complete Collection Worksheet Report

(Access Key: B) (Access Key: X)

For example:

If you want to see customers who are two to fifteen days late:

1. Click in FROM DAYS LATE field.
2. Type **2** in the FROM DAYS LATE field.
3. Click in TO DAYS LATE field.

4. Type **15** in the TO DAYS LATE field.

5. Click on neXt or press ALT + X to view the report.

If you want to see the complete COLLECTION WORKSHEET report:

1. Leave the fields blank and simply click neXt or press ALT + X.

The COLLECTION WORKSHEET provides you with a list of customers who are a specific number of days late in payment.

The complete report shows all customers who are delinquent more than two (2) days.

Collection Worksheet

Entity: [illegible] Date: 3/13/2001

CUST NAME/PHONE#'S	ROOM	PD-THRU	FEES DUE	RENT DUE	TOTAL DUE	DAYS LATE
Martin, James	A101	3/1/2001	$21.80	$39.95	$61.75	12
Home (602)933-8327					Notes	
Work	Last Payment Date:					
	Last Paid Amount:		0			
	Delinquency Stage:		2-15			
Jones, Marie	A113	2/21/2001	$30.80	$39.95	$70.75	20
Home (602)263-8383					Notes	
Work	Last Payment Date:					
	Last Paid Amount:		0			
	Delinquency Stage:		16-30			
Frank, Sam	A117	3/6/2001	$33.15	$74.95	$108.10	7
Home (602) 233-9183					Notes	
Work	Last Payment Date:					
	Last Paid Amount:		0			
	Delinquency Stage:		2-15			

The COLLECTION WORKSHEET provides you with:

- The CUSTOMER'S NAME, HOME, and WORK PHONE NUMBERS
- The ROOM NUMBER
- The PAID THROUGH DATE
- FEES and RENT DUE is a summary of all charges applied to this customer's account. Fees include late fees. Rent includes the room rent and all services associated with this rental.
- TOTAL DUE is a summary of the fees and rent due amounts.
- NUMBER OF DAYS LATE reflects days past due from the last paid through date through today.
- LAST PAYMENT DATE is the date on which you recorded the customer's last payment.
- LAST PAYMENT AMOUNT is the total amount of this last payment.
- Current DELINQUENCY STAGE shows the same categories that are reflected on the FACILITY UTILIZATION SUMMARY report.

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Click here to view instructions on report printing

Reviewing downloaded reservations

DOWNLOADED RESERVATION report provides you with a list of reservations that have been made by the Sales & Reservations department at U-Haul International.

The first page requires a range of dates. You can see outstanding reservations for any time period as long as they have not been used on a MOVE IN contract or have had a NO SHOW RESERVATION created.

Reporting Date Range

From: / / To: / /

Type Date Range Needed To Display Downloaded Reservations Report

(Access Key: B) (Access Key: X)

To input the date range:

1. Type a date in the FROM and TO date field, or leave the current date displaying.
2. Click or press ALT + X when you are ready to view the report.

The resulting report provides a reservation number. This RES NO is the CONTRACT NUMBER. Use this number when you recall the contract from the VIEW CONTRACTS selection on the main page.

Downloaded Reservations

Entity: 990019 Date: 3/13/2001-3/13/2001

RES NO	CUSTOMER NAME	PHONE NO	ROOM INFO	PAID
990019-00000496	MCCULLOCH, MICHAEL	(602)263-6617	1X1X1 CRATE COVERED NOCLIMATE BONUS	$0.02
990019-00000497	MCCULLOCH, MICHAEL	(602)263-6617	5X5X8 SC-10 SINGLE NOCLIMATE BONUS	$99.95

(Access Key: B)

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To recall a downloaded reservation

The DOWNLOADED RESERVATIONS report also provides the CUSTOMER NAME and PHONE NUMBER, any notes from the Sales & Reservations department, and the amount of money they customer paid on this reservation.

Click here to view instructions on report printing

Reviewing expiring credit cards

The EXPIRED CREDIT CARDS report provides you with a list of auto payment customers whose credit has expired.

This report provides you with the customer's name and phone number; the rented room, the alternate contact's phone number, the credit card number and the expiration month and year.

Expired Credit Cards

Entity: 990019 | Date: 3/13/2001

CUSTOMER NAME	RM #	PHONE NO	ALT PHONE NO	CARD NUMBER	EXP DATE
CHAVARRIA , BARBARA	569	(602)605-2049	602	4321123123123	10/00
				Grand Total:	1

Expiring Credit Cards

CUSTOMER NAME	RM #	PHONE NO	ALT PHONE NO	CARD NUMBER	EXP DATE

No Credit Cards Expiring This Month

(Access Key: B)

The second part of this report provides you with credit cards that will expire at the end of the current month. This gives you a head start on gathering the customer's new credit card information before the card expires. Thus preventing late fees for this customer.

Click here to view instructions on report printing

Reviewing facility utilization summary

The FACILITY UTILIZATION SUMMARY report is a snapshot of your storage location at this particular moment in time.

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Example of FACILITY UTILIZATION SUMMARY report

Facility Utilization Summary

Entity: [illegible] **Date: 3/14/2001**

Total Vacant Rooms	19
Total Occupied Rooms	179
Customers: 179	
System Use: 0	
Total Rooms At Facility	198
Total Facility Rentable Square Feet	19200
Total Occupied Square Feet	17700
Percentage Of Rooms Occupied	90.40%
Percentage Of Square Feet Occupied	92.19%
Percentage Of Delinquency	26.77%

Delinquency Schedule

	2-15 **Days**	16-30 **Days**	31-60 **Days**	61 To **Sale**	**Total**
Rooms	26	9	10	8	53
Amount Due	$1,851.20	$1,053.82	$2,198.47	$2,663.90	$7,767.39

Number Of Rooms On Automatic Payment	35
Percentage Of Rooms On Automatic Payment	17.68%
Number Of Rooms Covered By Safestor	24
Percentage Of Rooms Covered By Safestor	12.12%
Potential Rent Per Square Foot	$0.65
Potential Monthly Rent	$12,395.10
Monthly Income At Current Occupancy Rate (R = Rented Rooms Only)	$7,878.70
Monthly Income Lost From Unrented/Delinquent Rooms	$4,516.40
Percentage Of Income Lost	36.44%

Back

(Access Key: B)

This report has a wealth of information about your facility, and all on one page!

- TOTAL VACANT ROOMS provides a total of all rooms not currently rented. This includes all vacant rooms and all damaged rooms. If rooms are tied to a combined room, the individual rooms are counted as vacant; the combined room is not counted.
- TOTAL OCCUPIED ROOMS provides a total of all rooms currently rented. This count includes only individual rooms. If two or more individual rooms are assigned to a combined room, the individual rooms

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are included in the count, but not the combined room.

- CUSTOMERS provides a total of all occupied rooms regardless of the customer type or rental status.
- SYSTEM USE provides a break out of all occupied rooms that are set up with a system use customer type.
- TOTAL ROOMS AT FACILITY includes all individual rooms regardless of their room status (vacant, damaged, occupied, delinquent, and lien). This excludes the combined room, but includes the individual rooms that make up the combined room.
- TOTAL FACILITY RENTABLE SQUARE FEET is the total of the square feet of each individual room. This excludes combined rooms. It includes the individual rooms that make up a combined room.
- TOTAL OCCUPIED SQUARE FEET is the totals square feet of all rooms that are currently occupied regardless of their rental status (occupied, delinquent, or lien). Again, this excludes any occupied combined rooms, but includes the individual rooms that make up the occupied combined room.
- PERCENTAGE OF ROOMS OCCUPIED is the result of dividing TOTAL OCCUPIED ROOMS (TOR) by TOTAL ROOMS AT FACILITY (TRAF).
  – TOR / TRAF –
- PERCENTAGE OF SQUARE FEET OCCUPIED is the result of dividing TOTAL OCCUPIED SQUARE FEET (TOSF) by TOTAL FACILITY RENTABLE SQUARE FEET (TFRSF).
  – TOSF / TFRSF –
- PERCENTAGE OF DELINQUENCY is the result of dividing the TOTAL DELINQUENT ROOMS (TDR) by the TOTAL ROOMS AT FACILITY (TRAF).
  – TDR / TRAF –
- DELINQUENCY SCHEDULE is a breakdown of the number of ROOMS that are occupied and past due. In the example above, there are four different categories. 2- 15 days late, 16-30 days late, 30-60 days late, and over 61 days late. The AMOUNT DUE is the grand total of all fees and services not paid. A grand TOTAL of all the individual categories displays to the right of these categories.
- NUMBER OF ROOMS ON AUTOMATIC PAYMENT is total rooms currently being paid for on a monthly basis by a customer's authorized credit card.
- PERCENTAGE OF ROOMS ON AUTOMATIC PAYMENT is the result of dividing NUMBER OF ROOMS ON AUTOMATIC PAYMENT (NOROAP) by TOTAL ROOMS AT FACILITY (TRAF)
  – NOROAP / TRAF –
- NUMBER OF ROOMS COVERED BY SAFESTOR is the total number of occupied rooms in which the customer has purchased SAFESTOR protection.
- PERCENTAGE OF ROOMS COVERED BY SAFESTOR is the result of dividing NUMBER OF ROOMS COVERED BY SAFESTOR

(NORCBS) by TOTAL ROOMS AT FACILITY (TRAF).
– NORCBS / TRAF –

- POTENTIAL RENT PER SQUARE FOOT is the result of dividing POTENTIAL MONTHLY RENT (PMR) by TOTAL FACILITY RENTABLE SQUARE FEET (TFRSF).
  – PMR / TRFSF –
- POTENTIAL MONTHLY RENT is the grand total of all rooms' current rental rates.
- MONTHLY INCOME AT CURRENT OCCUPANCY RATE is the total amount of money collected from your customers for the month.
- MONTHLY INCOME LOST FROM UNRENTED/DELINQUENT ROOMS is the total rental amount of all vacant and damaged rooms plus all occupied rooms that have not been paid. Taking the POTENTIAL MONTHLY RENT (PMR) and subtracting the MONTHLY INCOME AT CURRENT OCCUPANY RATE (MIACOR), you arrive at this amount.
  – PMR – MIACOR –
- PERCENTAGE OF INCOME LOST is the result of dividing MONTHLY INCOME LOST FROM UNRENTED/DELINQUENT ROOMS (MILFUDR) by POTENTIAL MONTHLY RENT (PRM).
  – MILFUDR / PRM –

Click here to view instructions on report printing

Reviewing failed auto payments

Each night, after the CLOSING PROCESS has compiled the needed information and passed it to the BEST application for cash drawer balancing, the NIGHTLY BATCH PROCESS begins. A portion of this process is checking each room to see if the customer is an automatic payment customer. A second check is done to see if the customer has reached the bill date. If the customer is set up for auto payment and has reached his or her bill date, then the application goes through the electronic dial-up process. The dial-up process either receives approval from the credit card center to charge the rental amount on this customer's credit card account, or rejects the charge and sends back a message stating why the credit card payment was rejected. If the credit card center does not authorize this credit card charge, a failed payment tag is attached to the credit card information.

On a daily basis, it is advisable for you to review your FAILED AUTO PAYMENTS report. This way you can call the customer and attempt to receive new credit card information, or call the credit card authorization center and determine why the card was rejected.

The FAILED AUTO PAYMENT report requires the range of dates you want to see. The TO date cannot be later than today's date. The FROM date can go back to any time period.

Reporting Date Range

From: / /   To: / /

Type Date Range Needed To Display Failed Auto Payment Attempts Report

(Access Key: B) (Access Key: X)

Note: *Historical data from Domico was not carried to WebSelfStorage; therefore, the FROM date cannot go back any further than the date you started using WebSelfStorage*

The FAILED AUTO PAYMENT ATTEMPTS report provides you with a list of customers whose credit card were rejected in the NIGHTLY BATCH PROCESS.

Failed Auto Payment Attempts

Entity: 990019 **Date: 2/1/2001-3/13/2001**

CUSTOMER NAME	RM #	PHONE NO	ALT PHONE NO	CARD NUMBER	EXP DATE
MCCULLOCH, MICHAEL	116	(602)263-6617	(541)839-4839	4321321321321	01/05

Use this report as a tool to maintain accurate, up-to-date information about your auto payment customers.

Click here to view instructions on report printing

Reviewing invoicing customers

An invoicing customer is a customer who wants to be sent a reminder letter several days before their next bill date. Invoicing can be monthly, quarterly, semiannually, or annually.

Setting up invoicing is done within the rental contract. There is a different service fee associated with each invoicing option.

An example: If the customer wants to pay for their storage rental on a quarterly basis, you would select QUARTERLY on the INVOICING page within the rental contract. A charge of $4.00 is applied to this customer's account each time an invoice letter is generated. The customer agrees to pay three months in advance, with the understanding that the next letter won't be generated until the next quarter. The total quarterly rental and services amount owed plus the $4.00 invoicing charge is itemized on the invoicing letter.

To review customers who are using the invoicing option, select INVOICING CUSTOMERS report.

The INVOICING CUSTOMERS report shows the customer's account number, next bill date, type of invoicing, name, address and phone number and the total amount currently owed.

Invoicing Customers

Entity: 723025 — Date: 3/14/2001

CONTRACT # / NAME	NEXT BILL DATE / ADDRESS	TYPE / CITY	STATE	ZIP	PHONE	BALANCE
723025-00000002	4/5/2001	Quarterly				
JASPER, MARCUS	2512 W NORTHERN AVE	PHOENIX	AZ	85021	(602)744-5442	$0.00

Total: $0.00

(Access Key: B)

Click here to view instructions on report printing

Reviewing move outs

Each rental contract has a place where you can enter the EXPECTED MOVE OUT DATE. If the customer can approximate this date, make sure to record it. If you do, it can be used as a tool to help you analyze room availability in the future. The MOVE OUTS report provides a list of customers who have included this information on their rental contract.

The EXPECTED MOVE OUT REPORT provides you with the customer name, address phone number, along with the room number and the date he or she is expected to move out of the room.

Expected Move Out Report

Entity: 723025 — Date: 3/14/2001

CUSTOMER NAME	ADDRESS	CITY, STATE	PHONE #	RM	BAL
		12/12/2003			
YARCHON, KATHY	1525 W CHERRY DR	PHOENIX, AZ	(602)911-9775	1503	$0.00

(Access Key: B)

Click here to view instructions on report printing

Reviewing nightly batch letters

The nightly batch process runs each night after you complete your CLOSE PROCESS. Part of the nightly batch process is to create letters for such things as late notices, overpayments, partial payments, invoicing, etc. You can view and reprint any letter that is listed on the NIGHTLY BATCH LETTERS list page.

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The REPORTING DATE RANGE page requires you enter a FROM and TO date. The TO date cannot be later than today. The FROM date can go back as far as is needed.

Reporting Date Range

From: / / To: / /

Type Date Range Needed To Display Nightly Batch Letters Report

(Access Key: B) (Access Key: X)

***Note**: Historical data from Domico was not carried to WebSelfStorage; therefore, the FROM date cannot go back any further than the date you started using WebSelfStorage*

The NIGHTLY BATCH LETTERS list page provides you with information on letters produced in previous nightly batch processes.

Nightly Batch Letters

Entity: 990019 Date: 1/13/2001-3/13/2001

ROOM	CUSTOMER	LETTER	DATE & TIME
14	BALLYS, TOTAL FITNESS	1 DELINQ	3/13/2001 1:33:17 PM
14	BALLYS, TOTAL FITNESS	1 DELINQ	3/13/2001 1:33:23 PM
5411	MCDOWELL, ROD	1 DELINQ	3/13/2001 1:33:29 PM
5411	MCDOWELL, ROD	1 DELINQ	3/13/2001 1:33:32 PM
X0010V	PONCE, MARIA	1 DELINQ	3/13/2001 1:33:35 PM
Y0001U	DOUGLAS, SENIOUR	OVER PAYMENT	3/9/2001 7:41:43 AM

(Access Key: B)

Notice on this page the LETTER column. Each letter name is a hypertext link to the actual letter.

To view a letter:

1. Click on the underlined letter you want to view, or press TAB until the cursor is over the underline letter, then press ENTER to view.

CMD DALLAS
920 MEYERS ROAD
GRAND PRAIRIE, TX 75050
Phone #(000)000-0000

Date: 3/5/2001

RATE CHANGE

An example of a letter selected from the NIGHTLY BATCH LETTERS list page.

CHRIS BIERMAN
605 N. 95TH CIRCLE
TOLLESON, AZ 85353

Dear CHRIS BIERMAN,

We are committed to providing you and your belongings with a better and better product. We believe that this creates more value for you, our customer. Effective 3/15/2001, your monthly base rent for storage room #1521 is being changed to $50.00.

If you have any questions about your new storage rent rate, please ask your U-Haul Center Manager

Thank you for storing at U-Haul.

Sincerely,

Manager
CMD DALLAS

Click here to view instructions on report printing

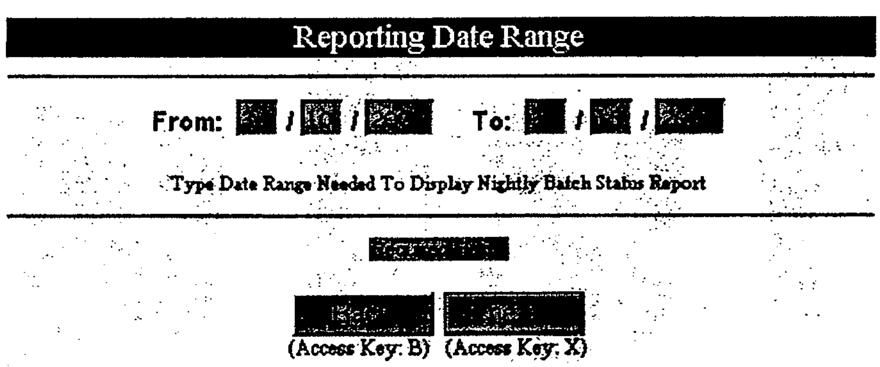
To return to the previous page after viewing or printing a letter:

1. Click on the menu bar at the top of the page.

Reviewing nightly batch status

The NIGHTLY BATCH STATUS report provides you with a recap of the number of transaction created.

The REPORTING DATE RANGE page requires you enter a FROM and TO date. The TO date cannot be later than today. The FROM date can go back as far as is needed.



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Note: *Historical data from Domico was not carried to WebSelfStorage; therefore, the FROM date cannot go back any further than the date you started using WebSelfStorage*

The NIGHTLY BATCH STATUS report shows the types of letters and transactions created in the nightly batch process for the selected period of time.

To see the individual letters, select <u>**NIGHTLY BATCH LETTERS**</u> *from the STORAGE REPORT LIST page.*

Nightly Batch Status

Entity: 328859 **Date: 3/10/2001-3/15/2001**

TRANSACTIONS	TOTAL PROCESSED
Auctions	0
Auto Payments	5
Delinquencies	3
Expired Quotes Purged	0
Invoicing	0
Letters	0
No Show Reservations Removed	0
Over Payments	0
Partial Payments	4
Processed Money Collected	0
Rate Changes	0
Room Number Changes	0
Tax Rate Changes	0
Unit Mix Capture	1

Back

(Access Key: B)

Within the time frame you selected on the REPORTING DATE RANGE page:

AUCTIONS – provides a count of rooms that are in auction status and have notification letters created.

AUTO PAYMENTS – provides a count of customers whose credit cards were charged as part of the auto payment process.

DELINQUENCIES – provides a count of customers who became delinquent.

EXPIRED QUOTES PURGED – provides a count of QUOTED RESERVATIONS that were removed from the computer.

INVOICING – provides a count of invoice letters.

LETTERS -- provides a count of the letters created.

NO SHOW RESERVATIONS REMOVED – provides a count of CONFIRMED RESERVATIONS removed from the computer.

OVER PAYMENTS – provides a count of customers who overpaid.

PARTIAL PAYMENTS – provides a count of customers who underpaid.

PROCESSED MONEY COLLECTED – provides a total of the amount of money collected from customers.

RATE CHANGES – provides a count of units that had rate changes.

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ROOM NUMBER CHANGES – provides a count of the units that had room number changes made.

TAX RATE CHANGES – provides a count of customers who had tax rate change letters created.

UNIT MIX CAPTURE – provides a count of the times the UNIT MIX capture was done. The NIGHTLY BATCH PROCESS creates SECTION II and SECTION III of the UNIT MIX REPORT. These sections do not change during the day as you view the UNIT MIX REPORT. Only SECTION I is dynamically created whenever you select the UNIT MIX REPORT. This means that SECTION I is calculated from data currently available on the database and reflects everything you have done at your facility thus far. SECTION II and III are snapshots of what was done the previous day, through and including what occurred during the NIGHTLY BATCH PROCESS.

Click here to view instructions on report printing

Reviewing no show reservations

A CONFIRMED RESERVATION made either by your center or by the Sales & Reservations department at U-Haul International remains on your computer a set number of days after the expected move in date. This number of days is determined and set by the Storage Production Group. If the customer has not moved in, or asked for a refund on this reservation by the time set, the application removes the reservation from your center.

- If the customer returns after the reservation is gone, you must instruct them to call the Customer Services department at U-Haul International for a refund.
- If the customer returns after the reservation is gone and wants to move in, they will have to pay for the move in. Instruct them to call the Customer Services department at U-Haul International for a refund on the original reservation.

Customer Services toll free phone number is **1-800-789-3638.** They can also send a note via the internet using the following address:

http://www.uhaul.com/customer/form_customer_service.html.

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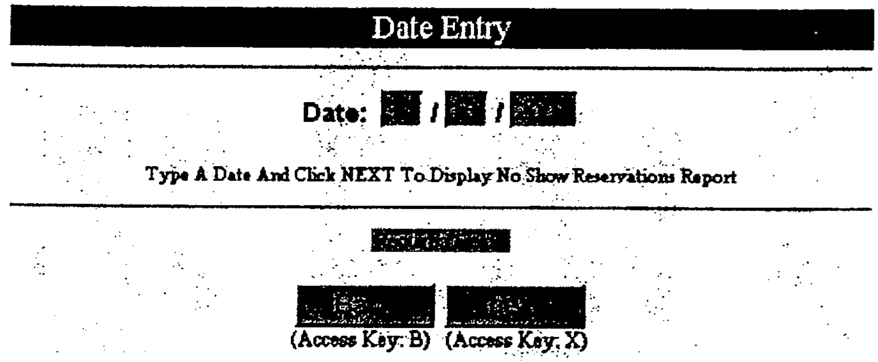
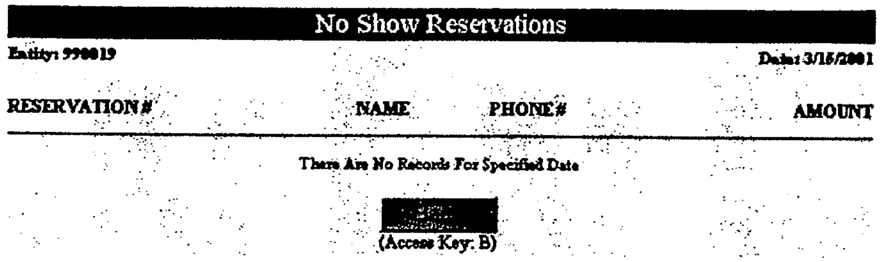
On the DATE ENTRY page, enter a date the no show reservation was made. Click [NEXT] or press ALT + X to continue to the report.



If there are no NO SHOW RESERVATIONS, the page provides a message to this effect as is shown in the example to the right.



The Storage Production Group has set the NO SHOW number of days after EXPECTED MOVE IN DATE to a substantial number of days to avoid problems with reservations aging off too soon. If you experience a problem with confirmed reservations no showing before a customer moves in or asks for a refund, contact the Storage Production Group to see if they can increase the duration. You can reach them by calling this number and asking for your individual representative (602) 263-6811.

<u>Click here to view instructions on report printing</u>

Reviewing rent roll

The RENT ROLL report is a recap of all occupied rooms at your facility. It displays in customer name order.

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The CUSTOMER RENT ROLL report provides you with a list of occupied rooms.

Customer Rent Roll Report

Entity: 990019 Date: 3/16/2001

CUSTOMER NAME / ADDRESS	MOVE-IN	ROOM	RENT	PAID-THRU	DAYS OCC.	BALANCE
		CITY, STATE, ZIP				
BALLYS, TOTAL FITNESS	3/8/2000	14	$5.95	2/7/2001	373	$311.49
2320 W PEORIA -A101		PHOENIX, AZ 85029				
BIERMAN, CHRIS	3/7/2001	0001	$5.95	4/29/2001	9	$0.00
605 N. 95TH CIRCLE		TOLLESON, AZ 85353				

Included in the CUSTOMER RENT ROLL REPORT is:

- The customer's name and address.
- The customer's move in date
- The room or rooms the customer occupies.
- The rental rate on the room.
- The date the customer is paid through.
- The number of days the customer has occupied the room.
- The balance owed by the customer.

Click here to view instructions on report printing

Reviewing rooms available

The ROOMS AVAILABLE report provides you with a list of vacant rooms by sizecode. This report can be used as a quick reference when talking with a customer who is looking for a particular size room to rent. You can tell at a glance the number of rooms of each size you have available. The report not only includes vacant rooms, but also shows you a count of all CONFIRMED RESERVATIONS made to this point in time.

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The ROOMS AVAILABLE report provides a quick view of the status of vacant rooms that are ready to rent.

Rooms Available

Entity: 822059

Date: 3/16/2001

SIZE	DESCRIPTION	SQ/CU FT	ROOMS	RATE
5X10X8	MINI OUTSIDE NOCLIMATE	50/400	E119, E125, E139, F109, F118, F126, F127, F134, F135, F139, F140, F141	$39.95
TOTAL ROOMS: 12				**TOTAL RESERVATIONS: 0**
10X10X8	MINI OUTSIDE NOCLIMATE	100/800	B108	$74.95
TOTAL ROOMS: 1				**TOTAL RESERVATIONS: 0**
10X15X8	MINI OUTSIDE NOCLIMATE	150/1200	B122, C122, C127	$84.95
TOTAL ROOMS: 3				**TOTAL RESERVATIONS: 0**
10X25X8	MINI OUTSIDE NOCLIMATE	250/2000	D114	$119.95
TOTAL ROOMS: 1				**TOTAL RESERVATIONS: 0**

= View Combined Room Information

Back

(Access Key: B)

The AVAILABLE ROOM reports provides the following:

- The complete sizecode including a full description.
- Each sizecode's dimensions in square feet and cubic feet.
- The rooms that are this sizecode.
- The rental rate for this sizecode.
- A count of total rooms available for each sizecode.
- A count of total CONFIRMED reservations for each sizecode.

Note: If a combined room is available to rent, it will show the paperclip icon to the right of it. If you want to see what individual rooms make up this combined room, click on the .

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This is an example of the COMBINED ROOM page you will see if you click on the paperclip icon while on the ROOMS AVAILABLE report.

Selected Room Information

Date: 3/16/2001 2:34:20 PM

ROOM #	SIZE	PRODUCT	FL	ELEV	CLIMATE	RATE
1511-13	10X10X8	SC-10	1	UPPER	CLIMATE	104.95

Combined Rooms Information

ROOM #	SIZE	PRODUCT	FL	ELEV	CLIMATE	RATE
1511	5X10X8	SC-10	1	UPPER	CLIMATE	64.95
1513	5X10X8	SC-10	1	UPPER	CLIMATE	64.95

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(Access Key: B)

The top half, or SELECT ROOM INFORMATION, shows the combined room. This gives you the room number, sizecode, and rental rate for the combined room. The customer will be charged this rate if they rent a combined room.

The bottom half, or COMBINED ROOMS INFORMATION, shows the individual rooms that make up the combined room. This portion of the report shows the individual room numbers, sizecodes and individual rates.

Click here to view instructions on report printing

Reviewing Safestor© coverage

The SAFESTOR COVERAGE report provides you with a list of customers who have purchases and are paying monthly for protection against loss or damage of their goods.

An example of the SAFESTOR CUSTOMERS report.
Use this report as a way to quickly check if a customer is utilizing Safestor.

Safestor Customers

Entity: 723025 Date: 3/16/2001

CUSTOMER NAME	RM #	PHONE NO	ALT PHONE NO	DESCRIPTION

There Are No Records For Selected Entity

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(Access Key: B)

The SAFESTOR COVERAGE report provides you with the following details:

- The customer's name.
- The room number this customer is renting.

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- The customer's phone number.
- The alternate contact's phone number.
- A description of the Safestor protection the customer is currently purchasing. Description examples include: Safestor $15,000, Safestor $10,000, or Safestor $4,000.

Click here to view instructions on report printing

Reviewing security access codes

The SECURITY ACCESS CODES report provides you with a list of customers and the security codes they presently are using to enter the storage facility through your security gate system.

A good security access system is worth its weight in gold if maintained correctly. To do this, each customer must have their own individual four to ten-digit numeric code. This assures that only they can access the storage facility, and that after they have moved out, no one else can access the facility using the same number.

The SECURITY ACCESS report provides a list of customers with security gate access clearance.

Security Access

Entity: 990019 Date: 3/16/2001

ROOM	CUSTOMER	ACCESS CODE	STATUS
0444	MCCULLOCH, MICHAEL	654	OCCUPIED
0922	BIERMAN, CHRIS	12345	OCCUPIED
1	MCCULLOCH, MICHAEL	654654	OCCUPIED
101	DOUGLAS, SENIOUR	11111	OCCUPIED
11	BIERMAN, CHRIS	12345	DELINQUENT

Included in the SECURITY ACCESS report is:

- The customer's occupied room number.
- The customer's name
- The access code
- The status of the customer.
  Statuses include: Occupied, delinquent, and lien.

Click here to view instructions on report printing

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Reviewing security access in/out

The SECURITY ACCESS IN/OUT report is an audit list showing the customer paid through date and the date the customer is paid into the future.

Security Access In/Out

Entity: [illegible] Date: 3/16/2001

ROOM	CUSTOMER	IN DATE/TIME	OUT DATE/TIME
A100	GRATRIX, RIKKI	4/4/2001	4/4/2001
A101	RUGGLES, RALPH	3/1/2001	4/1/2001
A102	PRINCE, KRIS	4/10/2001	4/10/2001
A103	SHOES, JARMAN	3/26/2001	3/26/2001
A104	ROBERTS, MONA	3/14/2001	4/14/2001
A106	HUDSON, AL KATHI	4/4/2001	4/4/2001

The SECURITY ACCESS IN/OUT report provides you with the following information:

- The room number.
- The customer's name.
- The date the customer is paid through.
- The date the customer is paid through if it is in a future month. For example: Mona Roberts in the example about is paid through April 14, 2001, which means she is paid a month ahead of her paid through date.

<u>Click here to view instructions on report printing</u>

Reviewing unit mix

The UNIT MIX report provides a recap of your facility on one page.

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On the DATE ENTRY page, type the date of the UNIT MIX report you want to review. The application always defaults to the current date. Click neXt *or press ALT + X.*

Date Entry

Date: 3 / 15 / 2001

Type A Date And Click NEXT To Display Unit Mix Sections II and III Report

Back neXt

(Access Key: B) (Access Key: X)

This is an example of SECTION I of the UNIT MIX report.

Occupancy/Vacancy Unit Mix

Entity: 828869 Date: 3/16/2001 3:26:01 PM

SECTION I

SIZE	DESCRIPTION	SQ FT	RENT RATE	RENT PER SQFT	# UNITS	TOTAL SQFT	OCC UNITS	VACANT UNITS	DMGED UNITS	OCC SQFT	% SQFT OCC	% UNITS OCC	GROSS POTL	PROJ ACTAL RENT
5X10X8	1 MINI O N	50	$39.95	$0.80	102	5100	89	13	0	4450	87.25	87.25	$4,074.90	$3,555.55
10X10X8	1 MINI O N	100	$74.95	$0.75	36	3600	33	3	0	3300	91.67	91.67	$2,698.20	$2,473.35
10X15X8	1 MINI O N	150	$84.95	$0.57	45	6750	41	4	0	6150	91.11	91.11	$3,822.75	$3,482.95
10X25X8	1 MINI O N	250	$119.95	$0.48	15	3750	14	1	0	3500	93.33	93.33	$1,799.25	$1,679.30
SUMMARY:					198	19200	177	21	0	17400			$12,395.10	$11,191.15

SECTION I of the UNIT MIX report includes:

- Each of the sizecodes including a complete description of each.
- The square feet for each sizecode.
- The current rental rate for each sizecode.
- The rental rate per square fee for each sizecode. Dividing the square feet into the rental rate derives this amount.
  – Example: $39.95 / 50 = $0.80 –
- Total rental units of this size
- Total square footage for this size. Multiple the total units by square feet.
  – Example: 102 * 50 = 5,100 –
- Total number of occupied rooms.
- Total number of vacant rooms.
- Total number of damaged rooms.
- Total occupied square footage. Multiply the total number of occupied rooms by the square feet.
  – Example: 89 * 50 = 4,450 –
- Percentage of square footage occupied. Dividing the total square footage into the occupied square footage derives this amount.
  – Example: 4,500 / 5,100 = 87.25% –
- Percentage of units occupied. Dividing the total units at facility into the total occupied units at the facility derives this amount.
  – Example: 89 / 102 = 87.25% –

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- Gross potential. Multiply the total number of units at the facility by the current rental rate.
  - Example: 102 * $39.95 = $4,074.90 –
- Projected actual rent. Multiply the total number of occupied units by the current rental rate.
  - Example: 89 * $39.95 = $3,555.55 –
- The summary at the bottom of SECTION I provides totals for each non-percentage column.

SECTION I is the only dynamic part of this report. Dynamic means that it is calculated each time you view this report. The application takes all rental information as of this point in time and provides you with an up-to-the-minute view of your facility.

SECTION II and SECTION III are created in the evening when the NIGHTLY BATCH PROCESS runs. These sections recap your facility as of the end of the previous day's business. Any transactions that you have completed today will not be reflected in SECTION II or SECTION III. When you begin and complete the CLOSING PROCESS, the application knows to start and complete the NIGHTLY BATCH PROCESS. The NIGHTLY BATCH PROCESS uses the recapped information from the CLOSING PROCESS to build the SECTION II and SECTION III UNIT MIX report. When you come in tomorrow, the new sections will be available to view and print.

SECTIONS II is created in the NIGHTLY BATCH PROCESS.

SECTION II

Date: 3/15/2001

SIZE	DESCRIPTION	# UNITS	BEG OCC	MOVE INS	MOVE OUTS	END OCC	NET CHG	SYS USE	RSVD UNITS	VAC UNITS	DAMG UNITS	% OCC	% VAC
10X10	CRATE C N BONUS	1	0	0	0	0	0	0	0	1	0	0.00	100.00
10X10999	CRATE C N BONUS	3	3	0	0	3	0	0	0	0	0	100.00	0.00
20X20	CRATE S H	12	9	0	0	9	0	0	0	3	0	75.00	25.00
20X20	CRATE S N	4	3	0	0	3	0	0	0	1	0	75.00	25.00
20X30	CRATE S N	1	0	0	0	0	0	0	0	1	0	0.00	100.00
40X30	LOCKERS S N	3	2	0	0	2	0	0	0	1	0	66.67	33.33
50X50	SC-10 S N	56	1	0	0	1	0	0	0	54	1	1.79	96.43
50X50	SC-10 S N BONUS	35	4	0	0	4	0	0	0	31	0	11.43	88.57
50X200	SC-10 S N	22	0	0	0	0	0	0	0	22	0	0.00	100.00
60X50	CRATE S N	5	0	0	0	0	0	0	0	5	0	0.00	100.00
70X70	WAREHOUSE S C BONUS	3	0	0	0	0	0	0	0	3	0	0.00	100.00
90X90	CRATE S N	5	0	0	0	0	0	0	0	5	0	0.00	100.00

SECTION II of the UNIT MIX report includes:

- The sizecode including the complete description.
- How many units make up this sizecode.
- The number of rooms that were occupied at the beginning this day for this sizecode.
- The number of move in contracts that were completed during this day

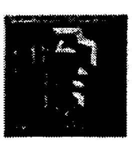
for this sizecode.

- The number of move out contract that were complete during this day for this sizecode.
- The number of rooms occupied at the end of this day for this sizecode.
- The net change between MOVE INS and MOVE OUTS. A positive number indicates more MOVE INS then MOVE OUTS. A negative number indicates more MOVE OUTS than MOVE INS.
- The number of active system use contracts.
- The number of confirmed reservations for this sizecode.
- The number of vacant rooms for this sizecode.
- The number of damaged rooms for this sizecode.
- The percentage of occupied rooms. The number of occupied rooms at the end of the day divided by the total number of rooms at the facility.
  – Example: 3 / 4 = 75% occupied –
- The percentage of vacant rooms. The number of vacant rooms divided by the total number of rooms at the facility.
  – Example: 54 / 56 = 96.43% vacant –
- The summary at the bottom of SECTION II provides totals for each non-percentage column.

SECTIONS III is created in the NIGHTLY BATCH PROCESS.

SECTION III

	0-3 MTH	4-6 MTH	7-9 MTH	10-12 MTH	1-2 YRS	2-3 YRS	3-4 YRS	4-5 YRS	5+ YRS
BUSINESS									
CUSTOMER #	0	0	0	0	0	0	0	0	0
TIME OCCUPIED %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MONTH FREE	0	0	0	0	0	0	0	0	0
MONTH FREE %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CORPORATE									
CUSTOMER #	0	0	0	0	0	0	0	0	0
TIME OCCUPIED %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MONTH FREE	0	0	0	0	0	0	0	0	0
MONTH FREE %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
INDIVIDUAL									
CUSTOMER #	8	4	1	1	10	0	0	0	0
TIME OCCUPIED %	33.33	16.67	4.17	4.17	41.67	0.00	0.00	0.00	0.00
MONTH FREE	0	0	0	0	0	0	0	0	0
MONTH FREE %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
SYS USE									
CUSTOMER #	0	0	0	0	0	0	0	0	0
TIME OCCUPIED %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MONTH FREE	0	0	0	0	0	0	0	0	0
MONTH FREE %	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTALS									
CUSTOMER #	8	4	1	1	10	0	0	0	0



SECTION III of the UNIT MIX report includes:

- A breakout of your customer base by CUSTOMER TYPE.
- CUSTOMER # -- Within each CUSTOMER TYPE is a break out of the occupied rooms by customer length of occupancy status. Reviewing the above example you find that INDIVIDUAL customers had a total of 24

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rooms occupied. 8 rooms have been rented for 0 to 3 months
4 rooms have been rented for 4 to 6 months
1 room has been rented for 7 to 9 months
1 room has been rented for 10 to 12 months
10 rooms have been rented for 1 to 2 years
0 rooms have been rented for 2 to 3 years
0 rooms have been rented for 3 to 4 years
0 rooms have been rented for 4 to 5 years
0 room have been rented for 5 plus years.

- TIME OCCUPIED % -- The result of dividing the room count of the individual categories by the total room count of all categories.
For example: 8 rooms (in the 0 to 3 month category) is divided by 24 to arrive at 33.33%
- MONTH FREE -- Total rooms that had a month free given to them anywhere in the life of the contract.
- MONTH FREE % -- The result of dividing the room count of the individual categories who used the month free by the total room count in all categories that used a month free. In the example page above, month free was not used; so all fields have a zero balance.
- The last portion of SECTION III contains a total count and summary of all CUSTOMER TYPES.

Click here to view instructions on report printing

Reviewing unit price list

The UNIT PRICE LIST report provides you with the individual sizecodes and the current rental rate associated with the sizecode.

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The UNIT PRICE LIST BY SIZECODE report provides you with the individual sizecodes and their descriptions. In addition, it shows the square and cubic footage available in the room size. The last column provides the current monthly rental rate for this sizecode.

Unit Price List By Sizecode

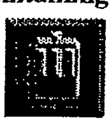
SIZECODE	DESCRIPTION	SQ/CU FT	RATE
5X5X8	1 SC-10 UPPER CLIMATE	25/200	$39.95
5X10X8	1 SC-10 LOWER CLIMATE	50/400	$69.95
5X10X8	1 SC-10 UPPER CLIMATE	50/400	$64.95
5X15X8	1 SC-10 LOWER CLIMATE	75/600	$89.95
8X12X7	1 VANBODY OUTSIDE NOCLIMATE	96/672	$79.95
8X16X7	1 VANBODY OUTSIDE NOCLIMATE	128/896	$94.95
8X20X7	1 VANBODY OUTSIDE NOCLIMATE	160/1120	$106.95
8X40X7	1 VANBODY OUTSIDE NOCLIMATE	320/2240	$131.95
10X10X8	1 SC-10 LOWER CLIMATE	100/800	$109.95
10X10X8	1 SC-10 UPPER CLIMATE	100/800	$104.95
10X15X8	1 SC-10 LOWER CLIMATE	150/1200	$156.95
10X15X10	1 RV COVERED NOCLIMATE	15/150	$44.95
10X15X25	1 RV COVERED NOCLIMATE	15/375	$44.95
10X25X10	1 RV COVERED NOCLIMATE	25/250	$69.95
10X30X25	1 RV COVERED NOCLIMATE	30/750	$74.95
10X50X25	1 RV COVERED NOCLIMATE	50/1250	$109.95

Click here to view instructions on report printing

Reviewing walk around

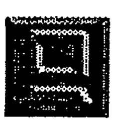
The WALK AROUND provides you with a list of rooms in the order in which you walk the facility. A sequence number is assigned to each room. The application then takes this sequence number and sort room inventory from the lowest to the highest sequence number before displaying this report. The WALK AROUND report can be a useful tool. In order for this report to be useful, you must maintain walk around sequence for all rooms. This is done on the ROOM INVENTORY page.

Maintaining walk around sequence



To maintain your walk around sequence using the mouse:

1. Click on INVENTORY MENU on the HOME or MAIN MENU page.
2. Click on ROOM INVENTORY.
3. Click on the picture frame icon next to the room you want to edit.



To main your walk around sequence using the keyboard:

1. Press TAB until the cursor is over INVENTORY MENU on the HOME or MAIN MENU page.

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2. Press ENTER.
3. Press TAB until the cursor is over ROOM INVENTORY.
4. Press ENTER.
5. Press TAB until the cursor is over the picture frame icon next to the room you want to edit.
6. Press ENTER.

The WALK SEQ field is the only field you can edit on this page. Type the correct walk around sequence number for this room in this field and click [button] or press ALT + S.

Room Inventory Worksheet

Entity: 723025 Rate: $106.95

ROOM: 0014
WALK SEQ:
EFF DATE: 1/23/2001
STATUS: VACANT

SIZECODES
8X20X7 VANBODY 1 OUTSIDE NOCLIMATE

(Access Key: B) (Access Key: S)

Complete the above process for all units, assigning each unit a unique number.

The DAILY WALK AROUND REPORT prints in ascending WALK # order. It provides you with a list of rooms, the status of each room, the customer currently occupying the room, and the move in and paid through dates of this customer.

Daily Walk Around Report For Entity 828059

WALK #	ROOM	STATUS	CUSTOMER	MOVE IN	THRU	ACCESS	NOTES
0	E107	OCC	CUNNINGHAM, MELISSA	3/3/2001	4/2/2001	-C	
1	E100	OCC	VILLAGOMEZ, JUAN	8/23/2000	3/22/2001	-C	
2	E101	OCC	KEN, CLAY	9/8/2000	4/7/2001	-C	
3	E102	OCC	LINDSAY, KRISTA	3/20/1999	3/19/2001	-C	
4	E103	OCC	SWANSON, AUDREY	10/26/2000	3/25/2001	-C	
5	E104	DEL	KRAEMER, JEFF	12/17/2000	1/16/2001	-R	
6	E105	OCC	MERSHEIMER, WALTER	2/12/2001	4/11/2001	-C	
7	E106	OCC	JESSICA, SPRINGER	5/29/2000	3/28/2001	-C	
8	E108	DEL	STILES, RAYE	9/16/2000	2/15/2001	-R	
10	E109	OCC	RANDALL, RICHARD	2/13/2001	3/12/2001	-C	
11	E110	OCC	VINCE, LANGLEY	11/13/2000	4/12/2001	-C	
12	E111	OCC	MACNAB, JAMIE	2/19/2001	3/18/2001	-C	

= Lien = Available = Damaged = Delinquent = Customer Lock = Keyed Lock

At the bottom of the WALK AROUND report you will find a template of

what each lock color represents.

Use the WALK AROUND report to verify each room's status as you walk the facility each morning.

Click here to view instructions on report printing

Closing Process and Nightly Batch

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System Use

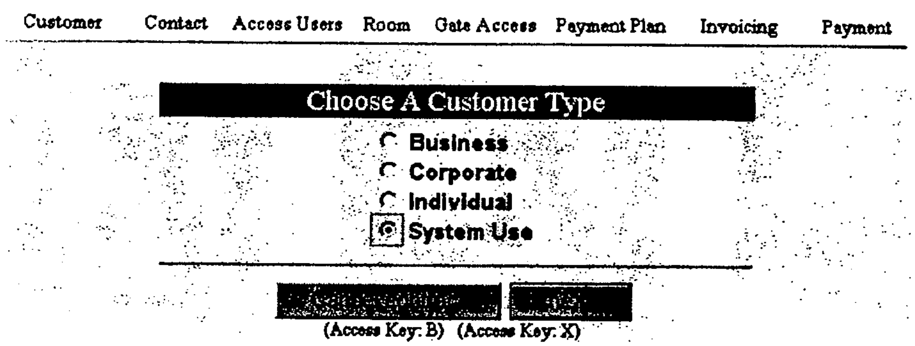
System use customer is a U-Haul entity that uses a room for U-Haul business.

Independent dealers are excluded from the SYSTEM USE designation. Dealers are business men and women who have a contractual agreement with U-Haul and are not part of the U-Haul corporate structure. Dealers who rent from U-Haul can be one of the other customer types depending on their relationship with U-Haul International.

To complete a contract for a system use customer, click SYSTEM USE radio button on the CHOOSE A CUSTOMER TYPE page.

Click

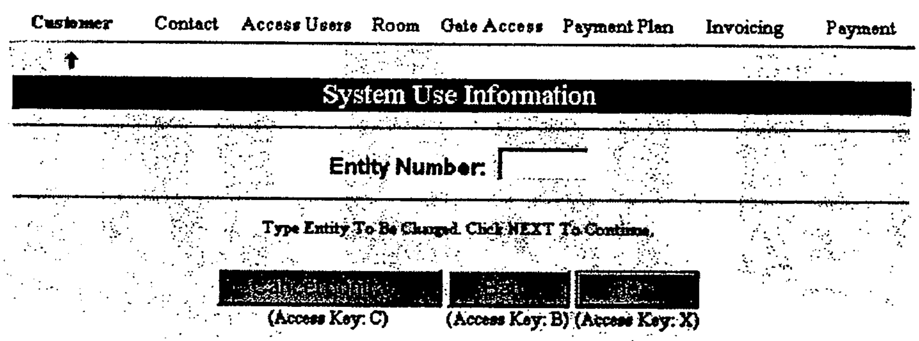
to continue.



Type the entity's six-digit number in the corresponding field.

Click

to continue.



All system use contracts require a contact person who is responsible for the room. This person's name and address must be entered on the CUSTOMER INFORMATION page. The remaining contract is identical to what has already been discussed. The only difference is when you take payment. The only option available is SYSTEM USE.

Go to the contract type to see instructions on completing the contract.

Appendix – Quick Reference

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Appendix – Quick Reference

This section provides a quick reference to various items used by the application.

State abbreviations

Sizecode information

Letter Template items -- Dealers

State Abbreviations

You are required to input the state abbreviations on several screens. The list below provides all fifty states and the Canadian provinces.

AL - Alabama
AK - Alaska
AB - Alberta
AZ - Arizona
AR - Arkansas
BC - British Columbia
CA - California
CO - Colorado
CT - Connecticut
DE - Delaware
DC - District of Columbia
FL - Florida
GA - Georgia
HI - Hawaii
ID - Idaho
IL - Illinois
IN - Indiana
IA - Iowa
KS - Kansas
KY - Kentucky
LA - Louisiana
ME - Maine
MB - Manitoba
MD - Maryland
MA - Massachusetts
MI - Michigan
MN - Minnesota
MS - Mississippi
MO - Missouri
MT - Montana
NE - Nebraska
NV - Nevada
NF - Newfoundland
NK - New Brunswick
NH - New Hampshire
NJ - New Jersey
MN - New Mexico
NY - New York
ON - Ontario
OR - Oregon
PA - Pennsylvania
PE - Prince Edward Island
QU - Quebec
RI - Rhode Island
SS - Saskatchewan
SC - South Carolina
SD - South Dakota
TN - Tennessee
TX - Texas
UT - Utah
VT - Vermont
VA - Virginia
WA - Washington
WV - West Virginia
WI - Wisconsin
WY - Wyoming
YK - Yukon Territory

NC - North Carolina
ND - North Dakota
NW - Northwest Territory
NS - Nova Scotia
OH - Ohio
OK - Oklahoma

Sizecode information

A sizecode is a complete description of a particular room inventory product. A sizecode consist of the following individual specifications:

Width – the width of a room measured in feet.

Length – the length of the room measured in feet.

Height – the height of the room measured in feet.

Product – A description given this room to differentiate it from other rooms. Currently the product descriptions include:

> **Crate** – a box or container.
> **Interior** – a storage room that does not have an exterior wall.
> **Lockers** – a locker-style storage space.
> **Office space** – a room or rooms that can be used as offices.
> **Mini** – a small storage space.
> **RV** – a parking space for a recreational vehicle.
> **SC-10** – modular storage space – rooms are assembled into upper and lower rooms.
> **Van body** – an old U-Haul truck van body that has been removed from the truck.
> **Warehouse** – a large building or floor of a building that can be utilized as a large storage facility.

Floor – the location of the rooms that make up this sizecode. Floor can be 0 through 9. 0 is designated as basement.

Elevation – the specific position of the rooms

> **Inside** – is not adjacent to any exterior walls
> **Covered** – an outside storage space that has a protective roof.
> **Enclosed** – an outside storage space that is enclosed with walls and a roof.
> **Lower** – used in conjunction with the SC-10 models to designate modular rooms built at ground level.
> **Street** – rooms that are found at street level.
> **Upper** – used in conjunction with the SC-10 models to designate modular rooms built above the ground level rooms.
> **Outside** – a room that has at least one exterior wall.

Climate – description of room's heating and/or cooling designation

> **NoClimate** – no heating or cooling is done.
> **Climate** – cooling is done in hallways.
> **Heated** – heating is building.
> **AirCooled** – cooling is done in building.

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Access – Access to rooms specifically for storage facilities with more than ground-level storage.

Elev – an elevator is used to access this room's floor.
Stair – a staircase is used to access this room's floor.

Doors – the type of door used by this size room.

Rollup – a metal or wooden door that rolls up into the roof of the room. Much like a garage door.
Swing – a metal or wooden door that swings out of the way when opened.
Chainlink – a door made of chain link fence material.
Metal – a metal door.

Bonus – a checkbox that enables you to assign a different rate to rooms of the same size. For example, you have ten 5 x 5 rooms. One of these rooms has a pillar in the middle of it. You want to give the customer renting this room a different rate. In order to do this, you would set up two sizecodes. All fields but the BONUS and RATES field would be the same for the two sizecodes. For the sizecode with the obstruction, you would check the BONUS checkbox and enter a different rate.

Comments – a space to type information about this unique sizecode.

Rate – the current rate you want to charge for this product.

Location, Mechanical, Obstruction, Shape, and **Special** – Additional description of the sizecode

Letter template items -- Dealers

Within the LETTER TEMPLATES page you find a list of items that refer to database fields. Each field provides information about your storage facility that can be used to create a customer letter. Below is a list of these elements and a short explanation of their meaning.

<<AuctionDate>> The date of a scheduled auction. This date is set up in the AUCTIONS functions found within the INVENTORY MENU.

<<AuctionProcTot>> This is the total amount collected from the sale of the customer's goods at auction. This amount must first be entered on the AUCTIONS page within the INVENTORY MENU.

<<CustAddress>> This is the customer's address including street address, city, state, and zip code.

<<CustomerLabel>> This is the customer's name and address including first and last name, street address, city, state, and zip code.

<<CustomerName>> This is the customer's first and last name.

<<InvoiceDate>> The invoicing date. Invoicing is controlled within the SITE BUSINESS RULES. Once established, it can be used within a

rental contract for customer's who want to receive an invoice billing notification letter.

<<LastPayDate>> The date the customer last made payment on their rent.

<<NewRateEffDate>> The date a new rate change will take effect.

<<PayDueDate>> The date payment is due on a room.

<<PayThruDate>> The date payment is paid through.

<<TaxChngEffDate>> The date a tax rate change will take effect.

<<TodayDate>> Today's date.

<<fsDelPeriod>> First delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

<<fsDelRate>> First delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the first delinquency period.

<<scDelPeriod>> Second delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

<<scDelRate>> Second delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the second delinquency period.

<<thDelPeriod>> Third delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

<<thDelRate>> Third delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the third delinquency period.

<<foDelPeriod>> Fourth delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

<<foDelRate>> Fourth delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the fourth delinquency period.

<<ffDelPeriod>> Fifth delinquency period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

<<ffDelRate>> Fifth delinquency rate. This is established in SITE BUSINESS RULES. It is the late fee assessed when a customer reaches the fifth delinquency period.

<<LienPeriod>> Lien period. This is established in SITE BUSINESS RULES. It is the number of days past the due date on a rental.

the number of days past the due date on a rental.

<<LienRate>> Lien fee. This is established on SITE BUSINESS RULES. It is the lien sale fee assessed when a customer reaches the lien period.

<<CenterCity>> Your business resides in this city.

<<CenterState>> Your business resides in this state.

<<CenterZip>> Your business resides within this zip code.

<<EntityLabel>> Your complete business name, address, and phone number.

<<EntityName>> Your complete business name.

<<Discounts>> The dollar amount of discounts included on a customer's rental contract. Discounts are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<DiscountsDue>> The dollar amount of discounts included in a customer's outstanding balance owed.

<<Fees>> The dollar amount of fees included on a customer's rental contract. Fees are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<FeesDue>> The dollar amount of outstanding fees not yet paid for by the customer.

<<Safestore>> The dollar amount of SAFESTOR charges included on a customer's rental contract. SAFESTOR charges are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<SafestoreDue>> The dollar amount of outstanding SAFESTOR charges not yet paid for by the customer.

<<Services>> The dollar amount of service charges included on a customer's rental contract. Service charges are established on the CHG/DISC ALLOCATIONS page within UHI MANAGEMENT. Once established, they can be selected within a contract.

<<ServicesDue>> The dollar amount of outstanding service charges not yet paid for by the customer.

Bold To display a block of text in darker, and wider black to make it stand out from the other text around it. Click on Bold, put the cursor between the and , and type the information you want to display in bold.

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Center To center a block of text. Click Center, put the cursor between the <div align=center> and </div>, and type the information you want centered.

Italics To display a block of text in italics. Click Italics, put the cursor between the <i> and </i>, and type the information you want italicized.

Tab To indent a line. Click Tab. Start typing your text after this.

Underline To display a block of text with a line under it. Click Underline, put the cursor between the <u> and </u>, and type the information you want underlined.

<<CurrentRate>> The current rental rate of the customer's room including taxes.

<<NewRoomRate>> The new rate recently established, which will eventually replace the current rate. New rates are established on the RATES page. The period of time designation is defined on SITE BUSINESS RULES page. Both of these functions can be found within UHI MANAGEMENT.

<<RateChgReason>> The reason for this rate change. This reason can be found on the RATES page within UHI MANAGEMENT.

<<RentDue>> The rent that is currently owed by the customer.

<<RoomRate>> The current room rate without taxes.

<<ContractBal>> The balance of a customer's contract. This includes are rent, discounts, services, fees, etc. that are owed.

<<ContractCredit>> This is the amount of a customer's overpayment.

<<PayDueAmntBrk>> This is the payment due amount summary. It shows the total monthly rent, date of last payment, amount of last payment, the payment due date, the paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees, SAFESTOR, services, taxes and current balance.

<<InvoiceFee>> For invoicing customers, this shows the fee they are charged for this service. This fee is established on the SITE BUSINESS RULES page. Once established, it can be used within a contract.

<<LastPayAmnt>> The amount of payment last made on a customer's account.

<<LastPayAmntBrk>> An account summary which includes: The total monthly rent, date of last payment, amount of last payment, payment due date, paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees, SAFESTOR, services, taxes and

current balance.

<<NextMonthsBal>> The amount owed in the next month.

<<NextMoNewBal>> The amount owed in the next month including all fees, services, rent, SAFESTOR, etc.

<<NrmlPayAmntBrk>> An account summary which includes: Monthly rent, date of last payment, amount of last payment, payment due date, paid through date, an overpayment amount (contract credit), and a breakout of rent, discounts, fees SAFESTOR, services, taxes and current balance.

<<OldRmNumber>> The old room number.

<<OverPayAmnt>> The overpayment amount.

<<RmNumber>> The current room number.

<<RoomBal>> The balance owed on the room.

<<CurrentTaxAmount>> The tax amount currently charged the customer.

<<CurrentTaxRate>> The tax rate currently in use.

<<NewTaxAmount>> The new tax amount.

<<NewTaxRate>> The new tax rate.

<<TaxesDue>> Taxes due by the customer.

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Independent Dealer Information

Because you are an independent dealer, you have more flexibility within the application than does a center or marketing company. You control the setting of your rates, what sizecodes you want to maintain, the services you want to provide, and complete control over your room inventory. For this reason, this page provides you with additional instructions.

Included on this page and on other pages in this guide you will find information on the following topics:

- Home page views
- Change my password
- Inventory menu
  - Combined rooms
    - Adding sizecodes
    - Adding combined room
    - Linking rooms to a combined room
    - Unlinking rooms from a combined room
    - Deleting a room
    - Editing a room
    - Changing a room number
    - Changing walk around sequence
    - Changing room effective date, status, and sizecode
- Site management menu
- Storage messenger
- Storage note pad
- UHI management menu
  - Audit reports
  - Maintaining charges and discounts
  - Reporting of charges and discounts
  - Letter Maintenance
    - Adding a letter
    - Viewing a letter

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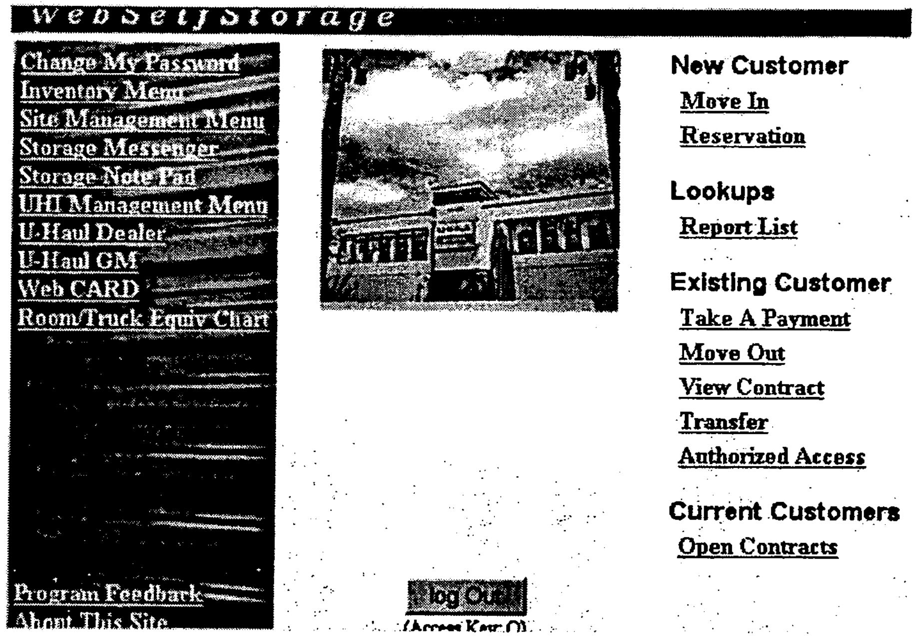
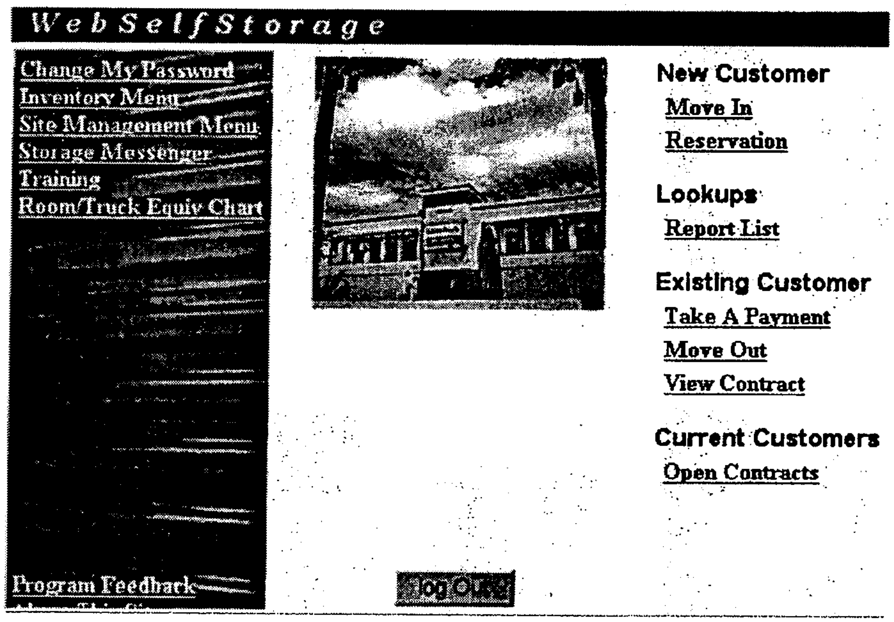
Home page view

Here is an example of the HOME page for an independent dealer. Notice there are several additional selections on this page that a center or marketing company would not see.



Here is an example of a counter person's HOME page. Notice several management features are missing from this page.



Additional security rights can be established as needed. If you need a new security level, contact the *WebSelfStorage* project team by using the FEEDBACK page. Tell us what specific functions you want the new security level to have. New rights can be established the same day as requested.

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Room Inventory

The ROOM INVENTORY page provides you with a few more options. Notice the icons to the left of each room number.

Room Inventory

Entity: 990028 Date: 5/29/2001

ROOM	SIZE	DESCRIPTION	STATUS	COM RMS	RATE
101	8X8X7	1 LOWER CLIMATE	VACANT		$34.95
102	8X8X7	1 LOWER CLIMATE	VACANT		$34.95
103	8X8X7	1 LOWER CLIMATE	VACANT		$34.95
104	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
105	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
106	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
107	4X4X5	1 INSIDE CLIMATE	VACANT		$24.95
108	4X4X5	1 INSIDE CLIMATE	VACANT		$24.95

Total Rooms: 8

= Combines More Than One Room Under This Number = Edits The Selected Room = Deletes The Selected Room

(Access Key: B) (Access Key: A)

Combined Rooms

The paperclip icon enables you to combine two or more rooms into a new room number. This is a management tool that enables you to rent underutilized rooms at a more attractive price. Combining a room requires a number of steps.

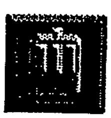
<u>**Adding sizecode**</u>

<u>**Adding a room number**</u>

<u>**Combining a room.**</u>

Adding sizecodes

A combined room requires its own specific sizecode. Sizecodes are control from the UHI MANAGEMENT MENU.



To set up a new sizecode using the mouse:

1. Click on UHI MANAGEMENT MENU on the HOME page.
2. Click on SIZECODES on the UHI MANAGEMENT MENU.

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Example of UHI MANAGEMENT MENU for an independent dealer.

UHI Management Menu

Audit Reports
Chg/Disc Allocations
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Click On An Underlined Item To View

Back
(Access Key: B)

3. Click Add on the SIZECODE LIST FOR ENTITY page.

Example of the SIZECODE LIST FOR ENTITY page

Sizecode List For Entity 990020

	SIZE	PROD.	DESCRIPTION	DOOR	BONUS	#RMS	RATE
	2X2X2	CRATE	8 COVERED NOCLIMATE	METAL		0	$12.00
	5X5X7	SC-10	2 LOWER CLIMATE ELEV	ROLLUP		0	$44.95
	8X8X7	SC-10	1 LOWER CLIMATE	ROLLUP		3	$34.95
	8X10X7	SC-10	1 LOWER CLIMATE	ROLLUP		3	$44.95

= Edit The Sizecode = Toggle Switch To Activate Or Deactivate A Sizecode

Back Add
(Access Key: B) (Access Key: A)

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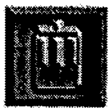
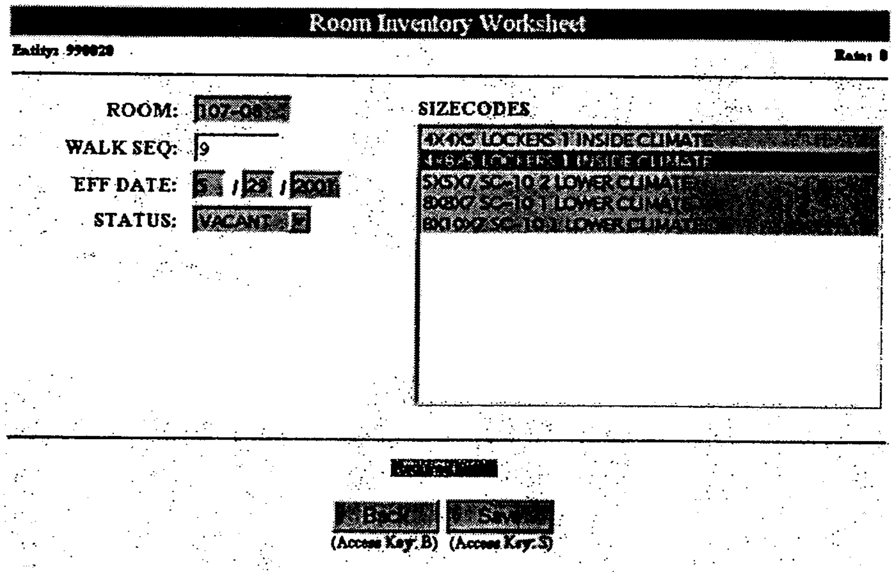
combined rooms.



To add a room using the mouse:

1. Click INVENTORY MENU from the HOME page.
2. Click ROOM INVENTORY from the INVENTORY MENU page.
3. Click Add on the ROOM INVENTORY page.

This is an example of adding a combined room



4. Type the *room number* in the ROOM field.
5. Type the *walk around sequence* in the WALK SEQ field.
6. Change effective date when necessary.
7. Change status when necessary. Status can only be VACANT or DAMAGED.
8. Click on the SIZECODE for this specific room.
9. Click Save.
10. Click Back to return to the previous page.

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This is what the ROOM INVENTORY page looks like after the room is added.

Room Inventory

Entity: 990020 Date: 5/29/2001

	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
	101 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	102 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	103 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	104 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	105 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	106 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	107 4X4X5	1 INSIDE CLIMATE	VACANT		$24.95
	107-08 4X8X5	1 INSIDE CLIMATE	VACANT		$42.95
	108 4X4X5	1 INSIDE CLIMATE	VACANT		$24.95

Total Rooms: 9

= Combines More Than One Room Under This Number = Edits The Selected Room = Deletes The Selected Room

(Access Key: B) (Access Key: A)

Linking rooms to a combined room

11. Click on the paperclip icon found next to the combined room number.

The COMBINED ROOM WORKSHEET page displays.

Selected Room Information

Entity: 990020 Date: 5/29/2001 4:45:02 PM

ROOM #	SIZE	PRODUCT	DESCRIPTION	RATE
107-08	4X8X5	LOCKERS	1 INSIDE CLIMATE	$42.95

Available/Combined Rooms

AVAILABLE ROOMS	COMBINED ROOMS
101 -8X8X7 1 LOWER CLIMATE	107 -4X4X5 1 INSIDE CLIMATE
102 -8X8X7 1 LOWER CLIMATE	108 -4X4X5 1 INSIDE CLIMATE
103 -8X8X7 1 LOWER CLIMATE	
104 -8X10X7 1 LOWER CLIMATE	
105 -8X10X7 1 LOWER CLIMATE	
106 -8X10X7 1 LOWER CLIMATE	

(Access Key: A) (Access Key: R)

(Access Key: B) (Access Key: S)

12. Click on the first individual room under AVAILABLE ROOMS that makes up this combined room. This highlights the room.
13. Click Add to move this room to the COMBINED ROOMS list.
14. Repeat step 2 and 3 for the remaining individual rooms that make up this combined room.
15. Click Save.
16. Click Return to return to the ROOM INVENTORY page.

Notice room 107-08. In addition, notice that the individual rooms are no longer listed under ROOM. Now look at the COM RMS column on the right side of the page next to RATES. The individual rooms are now listed as attachment to the combined room.

Room Inventory

Entity: 990020 — Date: 5/29/2001

ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
101 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
102 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
103 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
104 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
105 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
106 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
107-08 4X8X5	1 INSIDE CLIMATE	VACANT	107, 108	$42.95

Total Rooms: 7

= Combines More Than One Room Under This Number = Edits The Selected Room = Deletes The Selected Room

(Access Key: B) (Access Key: A)

Unlinking rooms from a combined rooms

Rooms linked to a combined room can be unlinked only when the combined room is in VACANT or DAMAGED status. When you unlink a combined room,

To unlink rooms from a combined room:

17. Click on the paperclip icon found next to the combined room number.
18. Click on a room found under COMBINED ROOMS.
19. Click Remove. This moves the room back to the AVAILABLE ROOMS list.
20. Repeat steps 2 and 3 for all remaining rooms.
21. Click Save.

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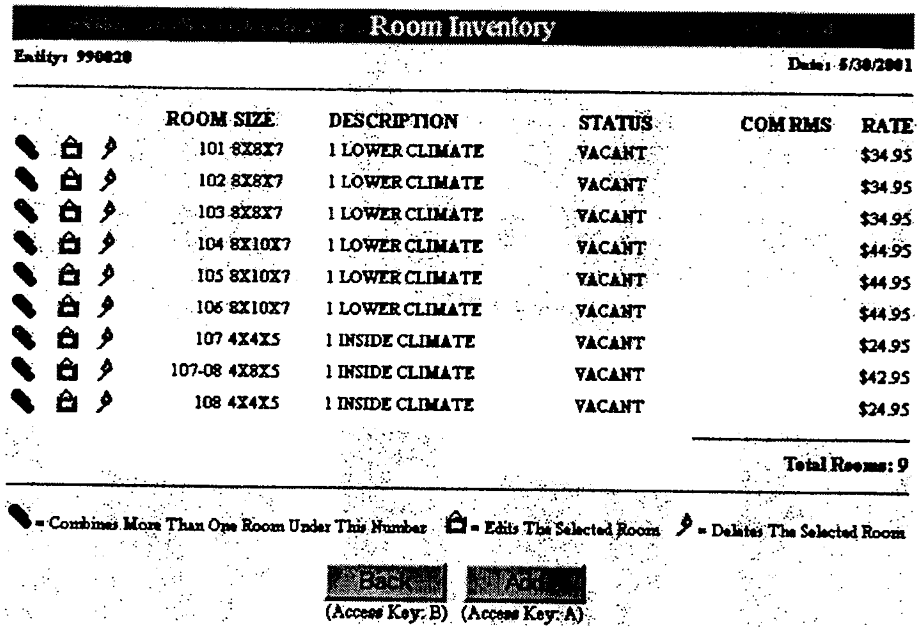
22. Click Back to return to the ROOM INVENTORY page.

Notice the two combined room (107 and 108) now display under the ROOM column.



Deleting a room

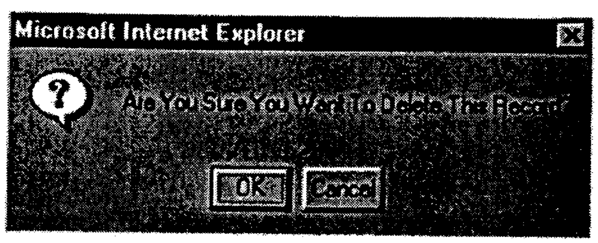
To avoid confusion, it is a good idea to delete a combined room from your active inventory after you have unlinked the individual rooms. In this way, inventory reporting remains accurate. Several reports, such as the facility utilization and unit mix report provide room counts and potential income. If you leave a combined room on inventory, these reports do not reflect true counts and totals.

Individual rooms can also be deleted at any time.

In both cases, the room being deleted must be in VACANT or DAMAGED status before you can delete it.

To delete a room from inventory:

1. Click on the flaming match icon found next to the room number you want to delete.



2. Click on OK to complete the delete.

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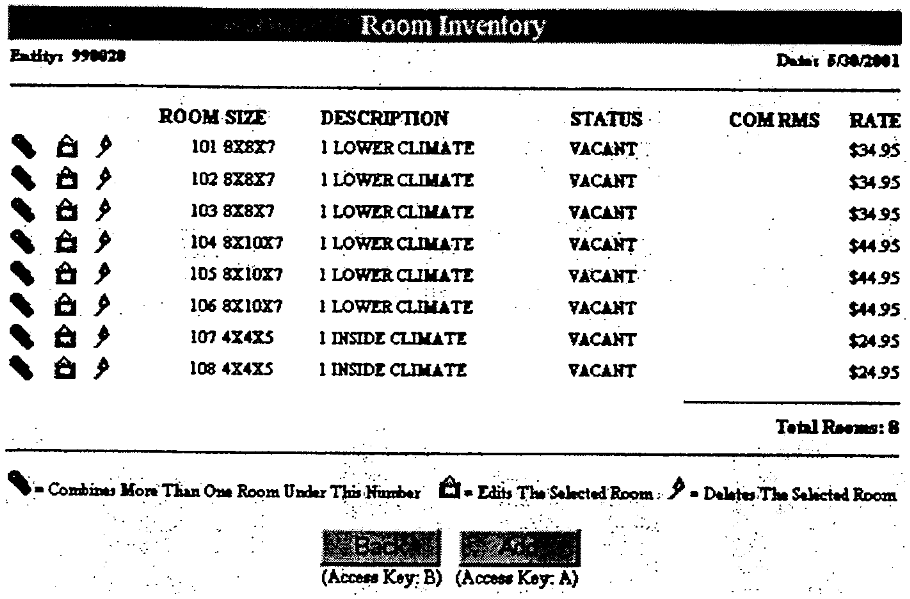
The room 107-08 was deleted from inventory. It no longer displays on the page.

If later you need to re-establish a deleted room number, simply add it back to your inventory and link the individual rooms to it.



Room Inventory

Entity: 990028 Date: 5/30/2001

	ROOM SIZE	DESCRIPTION	STATUS	COM RMS	RATE
	101 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	102 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	103 8X8X7	1 LOWER CLIMATE	VACANT		$34.95
	104 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	105 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	106 8X10X7	1 LOWER CLIMATE	VACANT		$44.95
	107 4X4X5	1 INSIDE CLIMATE	VACANT		$24.95
	108 4X4X5	1 INSIDE CLIMATE	VACANT		$24.95

Total Rooms: 8

= Combines More Than One Room Under This Number = Edits The Selected Room = Deletes The Selected Room

Back (Access Key: B) Add (Access Key: A)

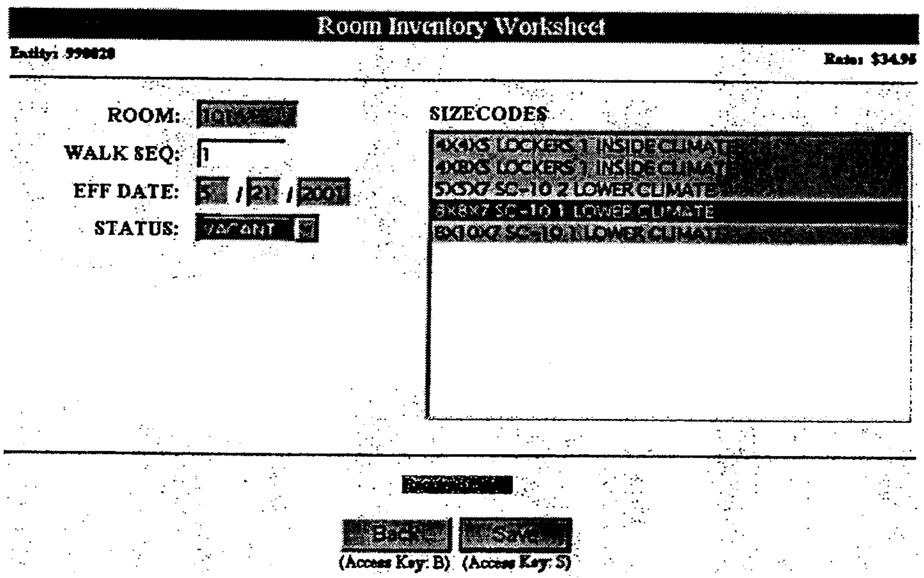
Editing room inventory

A room in inventory may need to be edited to adjust the walk around sequence number, change the room number, change the room status, change effective date or change its sizecode.

To edit room inventory:

1. Click the picture frame icon found next to the room number you want to edit.

The ROOM INVENTORY WORKSHEET page displays.



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Changing a room number

Occasionally, you may find it necessary to renumber rooms at your facility. *WebSelfStorage* enables you to capture room number changes easily.

To change room number:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Press INSERT to turn on the overtype feature.
3. Type the *new number* over the old.
4. Press INSERT to turn off the overtype feature.
5. Click

Note: If the room is rented, a ROOM NUMBER CHANGE letter is generated in the next nightly batch process.

Changing the walk around sequence

Walk around sequence is used by the DAILY WALK AROUND REPORT to provide you with information and enable you to easily track the status of each room at your facility. You control the order of this report by maintaining the WALK SEQ. on the ROOM INVENTORY WORKSHEET page.

The DAILY WALK AROUND REPORT can be found by clicking on REPORTS LIST on the HOME page.

To review information about this report click **here**.

Daily Walk Around Report For Entity 990020

WLK#	ROOM	SIZE	STATUS	CUSTOMER	MOVE IN	THRU	LOCK	NOTES
1	1011	8X8X7	VAC				-G	
2	102	8X8X7	VAC				-G	
3	103	8X8X7	VAC				-G	
4	104	8X10X7	VAC				-G	
5	105	8X10X7	VAC				-G	
6	106	8X10X7	VAC				-G	
7	107	4X4X5	VAC				-G	
8	108	4X4X5	VAC				-G	

= Lien = Available = Damaged = Delinquent = Customer Lock = Keyed Lock

(Access Key: B)

To change a room's walk around sequence:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Click in the WALK SEQ field, or press TAB until the cursor is in this field.

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3. Press INSERT to turn on the overtype feature.
4. Type the *new walk around sequence.*
5. Press INSERT again to turn off the overtype feature.
6. Click .

Changing effective date, status and sizecode

The EFFECTIVE DATE, STATUS and SIZECODES can also be changed on an existing room.

You may want to change the EFFECTIVE DATE when you make a room number change to keep track of the date this change was made.

STATUS can only be changed when a room is in VACANT or DAMAGED status.

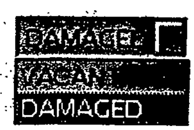
When you change a room from VACANT to DAMAGED you remove it from the list of available rooms within a rental contract.

When you reactive the room by changing it from DAMAGED to VACANT you add the room back into the pool of available rental units.

If the dimensions of a room change, because of construction or modular re-design, you can give this room a new sizecode by first adding the sizecode to the application and then pointing the room to this new sizecode.

To change effective date:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Click in the EFFECTIVE DATE's month field.
3. Press INSERT to turn on the overtime feature.
4. Type the *new effective month.*
5. Press TAB.
6. Type the *new effective day.*
7. Press TAB.
8. Type the *new effective year.*
9. Click .

STATUS: 

To change the status:

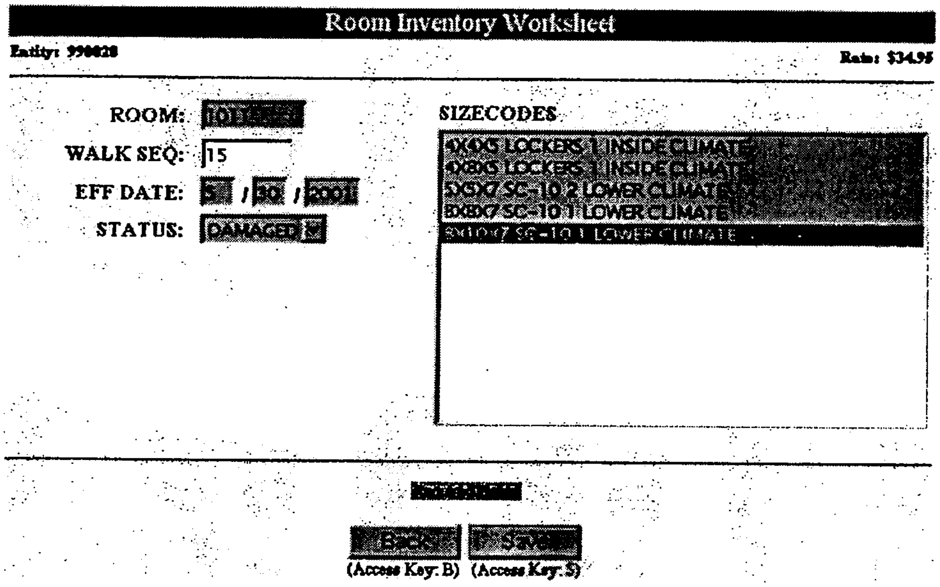
10. Go to the ROOM INVENTORY WORKSHEET page.
11. Click the down-arrow next to the list box entitled STATUS.
12. Click VACANT or DAMAGED to select.

13. Click Save.

To change the sizecode:

1. Go to the ROOM INVENTORY WORKSHEET page.
2. Scroll down the list of sizecodes.
3. Click on the new sizecode.
4. Click Save.

ROOM INVENTORY WORKSHEET page with a change made to each field.



In the above example, the original room number was changed from 101 to 1011.

WALK SEQ was changed from 1 to 15.

EFF DATE was changed from 5/21/2001 to 5/30/2001.

STATUS was changed from VACANT to DAMAGED.

SIZECODE was changed from 8x8x7 SC-10 1 Lower Climate to 8x10x7 SC-10 1 Lower Climate

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Notice on the ROOM INVENTORY page that room 1011 shows all changes.

Room Inventory

Entity: 990020 **Date: 6/30/2001**

ROOM	SIZE	DESCRIPTION	STATUS	COM RMS	RATE
1011	8X10X7	1 LOWER CLIMATE	DAMAGED		$44.95
102	8X8X7	1 LOWER CLIMATE	VACANT		$34.95
103	8X8X7	1 LOWER CLIMATE	VACANT		$34.95
104	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
105	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
106	8X10X7	1 LOWER CLIMATE	VACANT		$44.95
107	4X4X5	1 INSIDE CLIMATE	VACANT		$24.95
108	4X4X5	1 INSIDE CLIMATE	VACANT		$24.95

Total Rooms: 8

= Combines More Than One Room Under This Number = Edits The Selected Room = Deletes The Selected Room

(Access Key: B) (Access Key: A)

The ROOM INVENTORY page display changes as you rent rooms.

The flaming match icon does not display when the room is rented. This is done to prevent deleting an occupied room from inventory by mistake.

The paperclip icon does not display when the room is rented. This is done to prevent unlinking individual rooms that are part of a combined room, which is occupied. It also prevents adding an individual room to a combined room when the individual room is rented.

The paperclip icon does not display when the room is in damaged status. A damaged room should never be linked to a combined, rentable room for obvious reasons.

For security reasons, a counter person cannot complete most of the above functions. They only have access to changing walk around sequence. A counter person has the same rights as employees at U-Haul centers. To review what they can do, click here.

Site Management

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UHI management menu

The UHI MANAGEMENT MENU is the core of this application.

Several pages contain in this section enable you to set up business rules that control the way the application functions.

Other pages enable you to audit who is on the application as well as review historical transaction information.

The RATES selection enables you to establish new rates for the different sizecodes, as well as control when those rates will be applied.

The SIZECODES selection enables you to establish new sizecodes, edit existing sizecodes, and deactivate sizecodes.

To access this page, click UHI MANAGEMENT MENU on the left side of the HOME page.

UHI Management Menu

Audit Reports
Chg/Disc Allocations
Letter Maintenance
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Click On An Underlined Item To View

(Access Key: B)

Click on a linked item below to go to that part of the user's guide.

Audit Reports
Chg/Disc Allocations
Letter Maintenance
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Creating audit reports

The AUDIT REPORTS enables you to review transaction exceptions made. You can track waivered fees, as well as general fee added to a contract.

In order to understand where these fees come from, we first look at a contract and discuss how the information gets to these reports.

General fees can be waivered within a contract from the ACCOUNT LEDGER page by clicking on the yellow dot icon ● to the left of the fee.

Account Ledger

Contract No: 990028-00000002 **Customer: FRANKLIN JONES**

Show Me: 30 Days | **Order**: Ascending | **Show Rooms**: ALL | **Balance Due** $68.72

PAID	DUE	THRU	ROOM	DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE
✔	5/30/2001	6/29/2001	102	RENT	$34.95	1	$0.77	$35.72	$35.72
✔	5/30/2001	6/29/2001	102	CLEANING	$25.00	1	$0.00	$25.00	$60.72
✔	5/30/2001	6/29/2001	102	DUMPSTER	$20.00	1	$0.00	$20.00	$80.72
✔	5/30/2001	6/29/2001	102	SAFESTOR $10,000	$18.00	1	$0.00	$18.00	$98.72
$	5/30/2001			CASH				($98.72)	$0.00
	5/30/2001	6/29/2001	102	RENT	$34.95	1	$0.77	$35.72	$35.72
	6/30/2001	7/29/2001	102	SAFESTOR $10,000	$18.00	1	$0.00	$18.00	$53.72
●	5/31/2001		102	1ST STAGE DELINQUENCY FEE	$15.00	1	$0.00	$15.00	$68.72

$ = View Payment Detail ✔ = Paid In Full ⊖ = Reversed Charge ● = Waives Selected Fee

(Access Key: F)

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A new record is created on the ACCOUNT LEDGER page.

Account Ledger

Contract No: 998820-00000002 Customer: FRANKLIN JONES

Show Me	Order	Show Rooms	Balance Due
30 Days	Ascending	ALL	$78.72

PAID	DUE	THRU	ROOM	DESCRIPTION	RATE	QTY	TAX	TOTAL	BALANCE
✔	5/30/2001	6/29/2001	102	RENT	$34.95	1	$0.77	$35.72	$35.72
✔	5/30/2001	6/29/2001	102	CLEANING	$25.00	1	$0.00	$25.00	$60.72
✔	5/30/2001	6/29/2001	102	DUMPSTER	$20.00	1	$0.00	$20.00	$80.72
✔	5/30/2001	6/29/2001	102	SAFESTOR $10,000	$18.00	1	$0.00	$18.00	$98.72
$	5/30/2001			CASH				($98.72)	$0.00
	5/30/2001	6/29/2001	102	RENT	$34.95	1	$0.77	$35.72	$35.72
	6/30/2001	7/29/2001	102	SAFESTOR $10,000	$18.00	1	$0.00	$18.00	$53.72
⊖	5/31/2001		102	1ST STAGE DELINQUENCY FEE	$15.00	1	$0.00	$15.00	$68.72
⊖	5/30/2001		102	1ST STAGE DELI (reversed)	($15.00)	1	$0.00	($15.00)	$53.72
●	5/30/2001		102	CLEANED TAR FROM FLOOR OF STORAGE ROOM	$25.00	1	$0.00	$25.00	$78.72

$ = View Payment Detail ✔ = Paid In Full ⊖ = Reversed Charge ● = Waives Selected Fee

Both waivered and added fees are available from the AUDIT REPORTS page. Get to this page by clicking on AUDIT REPORTS on the UHI MANAGEMENT MENU.

Audit Reports

Manual Fees

Waived Delinquency Fees

Click On An Underlined Item To View

(Access Key: B)

Click on either MANUAL FEES or WAIVED DELINQUENCY FEES. The REPORTING DATE RANGE page displays. Type the range of dates you want to review. The FROM and the TO dates can be the same date. The

Reporting Date Range

From: / / To: / /

Type Date Range Needed To Display Manual Fees Report

(Access Key: B) (Access Key: X)

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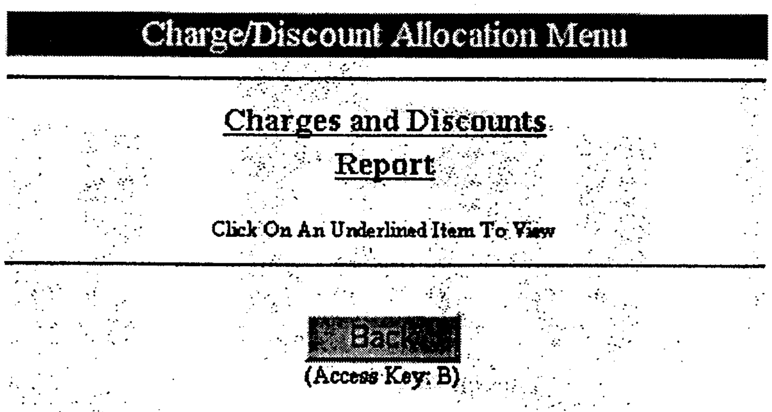
Maintaining charges and discounts

CHG/DISC ALLOCATIONS enables you to set up customer services that require a fee be taken from the customer. In addition, it enables you to set up customer discounts.

To get to the CHG/DISC ALLOCATIONS page:

1. Click on UHI MANAGEMENT MENU on the HOME page.
2. Click on CHG/DISC ALLOCATIONS on the UHI MANAGEMENT MENU page.

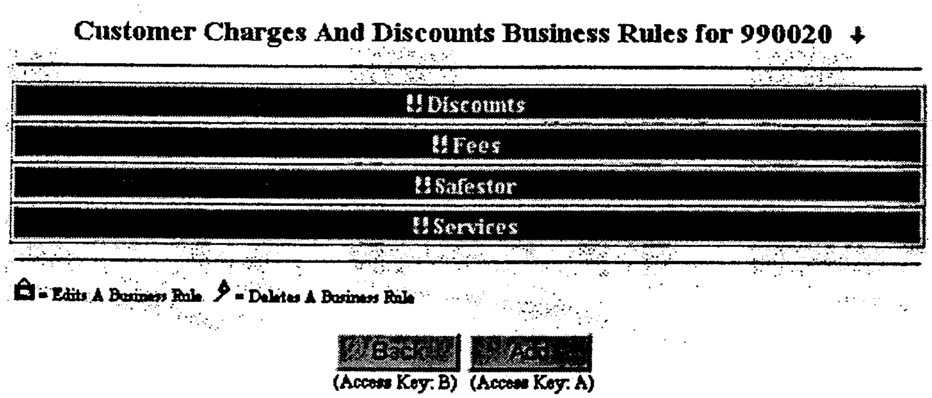
The CHARGE/ DISCOUNT ALLOCATION MENU has two selections. First we will review the CHARGES AND DISCOUNTS, then we will cover REPORT.



Editing the charges and discounts page

3. Click on the CHARGES AND DISCOUNTS MENU

The CUSTOMER CHARGES AND DISCOUNTS BUSINESS RULE page is similar to the RENTAL AGREEMENT page within a contract.



There are several icons used as hypertext links and to expand the page for viewing. These icons are discussed below:

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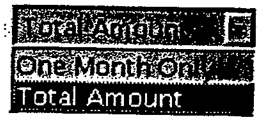
would be 25. This represents 25% of an amount.

If you enter a percentage in the RATE field, check the PERCENTAGE checkbox.

If you enter a dollar amount in the RATE field, DO NOT check the PERCENTAGE checkbox.

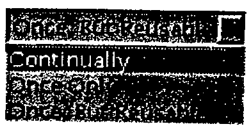
Apply rate to?:



To establish when the rate is applied, click the down-arrow next to APPLY RATE TO. Click on the selection you want.

- ONE MONTH ONLY means that the percentage is applied using first month rent only. If more than one rental charge is applied at the same time, only the percentage of the first month's rental charge is used to figure the percentage.
- TOTAL AMOUNT means that the percentage is calculated using the total rental charge. If the customer pays three months rental charge, the percentage calculation uses this total amount.

Frequency?:



To establish how often this rate is applied, click on the down-arrow next to FREQUENCY. Click on the selection you want.

- CONTINUALLY means that it is applied each time a rental charge is applied. Safestor protection is an example of a charge set up using this frequency.
- ONCE ONLY means that once the charge is applied to a customer, it no longer is charged on any other contract the customer might complete. A customer administrative fee is an example. The charge is assessed the first time the customer does business with U-Haul. Once this charge is applied, the customer is never charged again.
- ONCE, BUT REUSEABLE means that the charge is applied at different occasions throughout the life of the contract. An example would be a cleaning fee. If the area around the customer's room needs to be cleaned, you may want to charge them for the labor and supplies. If after a time, the area again needs cleaning, you may want to apply these same charges again.

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AVAILABLE TO USE WITH THE PRODUCT TYPES CHECKED

Interior: ☑ **Mini:** ☑ **SC-10:** ☑ **Lockers:** ☑ **Van Body:** ☑
Crate: ☐ **RV:** ☑ **Office Space:** ☐ **Warehouse:** ☑

You control what rental products use this charge or discount. Check the box next to the products that could have this charge or discount applied when this product is rented.

AVAILABLE TO USE WITH THE CONTRACT TYPES CHECKED

Reservation: ☐ **Move Ins:** ☑ **Payments:** ☑ **Transfers:** ☑ **Move Outs:** ☑

You also control what types of contracts display this charge. For example: You may not want to add any charges to a RESERVATION contract, in which case you would leave this box unchecked.

MISCELLANEOUS INFORMATION

User Selectable?: ☑ **Include on Audit Report?:** ☑ **Can It Be Reversed?:** ☑
Non Payment Of These Charges Require Delinquency Fees Be Applied: ☐

Check the boxes that apply.

Miscellaneous information includes:

- USER SELECTABLE means you are able to select it from the list of services within the contract.
- INCLUDE ON AUDIT REPORT means anytime this charge is used, it is then available to review on the audit report.
- CAN IT BE REVERSED means that the waiver icon ● is available so that the item can be reversed within a contract.
- NON PAYMENT OF THESE CHARGES REQUIRE DELINQUENCY FEES BE APPLIED means that if this fee is not paid, the customer becomes delinquent and late fees are applied when required.

AVAILABLE TO USE WITH CUSTOMER TYPES CHECKED

Corporate: ☐ **Individual:** ☑ **System Use:** ☐ **Business Account:** ☑

Check the boxes that apply.

Customer types must be check the same way you set SITE BUSINESS RULES. Review customer types on the SITE BUSINESS RULES page by clicking <u>here.</u>

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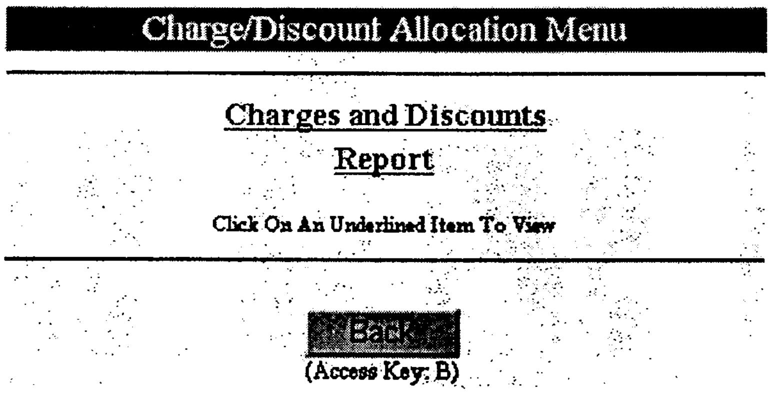
Click [Save] to add this new charge or discount.

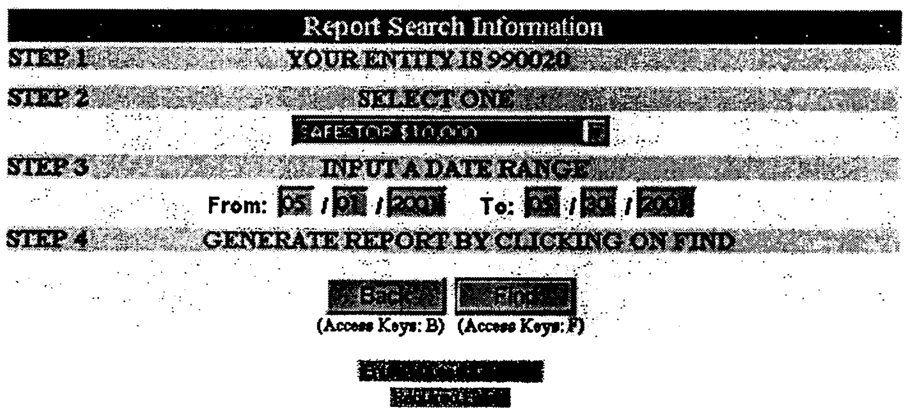
Reporting of charges and discounts

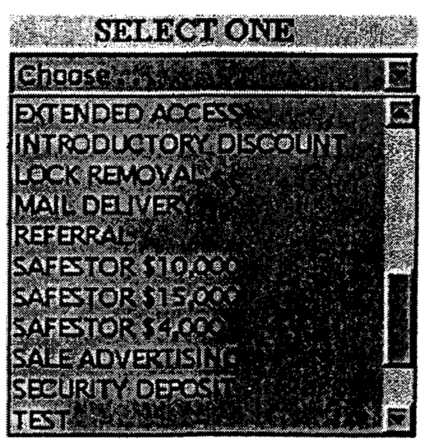
WebSelfStorage enables you to review the effectiveness of your charges and discounts by providing a detail report of these items. You control the timeframe of this report as well as the item you want to review.

To view the REPORT selection page, click on REPORT on the CHARGE /DISCOUNT ALLOCATION MENU.



An example of the REPORT SEARCH INFORMATION page.





To complete this page to retrieve information:

1. Click on the down-arrow under SELECT ONE.
2. Scroll the list until you find the charge or discount you want for this report.
3. Click on this charge or discount.

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INPUT A DATE RANGE

From: [illegible] / [illegible] / [illegible] **To:** [illegible] / [illegible] / [illegible]

4. Type the *from* and *to dates*.

Note: The dates can be the same day, but the *from date* cannot be after the *to date*.

5. Click [illegible] to see the resulting report.

Report For Entity 990019

Date: 1/1/2001-6/30/2001

STATUS	DESCRIPTION	ROOMS	AMOUNT
PAID	SAFESTOR $4,000	45	$526.01
REVERSED	SAFESTOR $4,000	8	($61.30)
NOT PAID	SAFESTOR $4,000	12	$137.00
	Totals:	**67**	**$601.71**

(Access Key B)

The report shows the total number of rooms in three categories:

– PAID means the customers have paid for the charges.

– REVERSED means the customers asked to have charges removed from their bill.

– NOT PAID means that applied charges have not been paid.

__Letter Maintenance__

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Letter Maintenance

Letters can be set up within this function and used by the application. The SITE BUSINESS RULES page controls what letters are used with what function. Creating and editing letters is done from the LETTER MAINTENANCE page.

From UHI MANAGEMENT MENU, click LETTER MAINTENANCE to view and edit letters.

UHI Management Menu

Audit Reports
Chg/Disc Allocations
Letter Maintenance
Rates
Site Business Rules
Sizecodes
Who Is Logged In

Click On An Underlined Item To View

(Access Key: B)

Click on LETTER TEMPLATES from the LETTER MAINTENANCE MENU.

Letter Maintenance

Letter Templates

Click On An Underlined Item To View

(Access Key: B)

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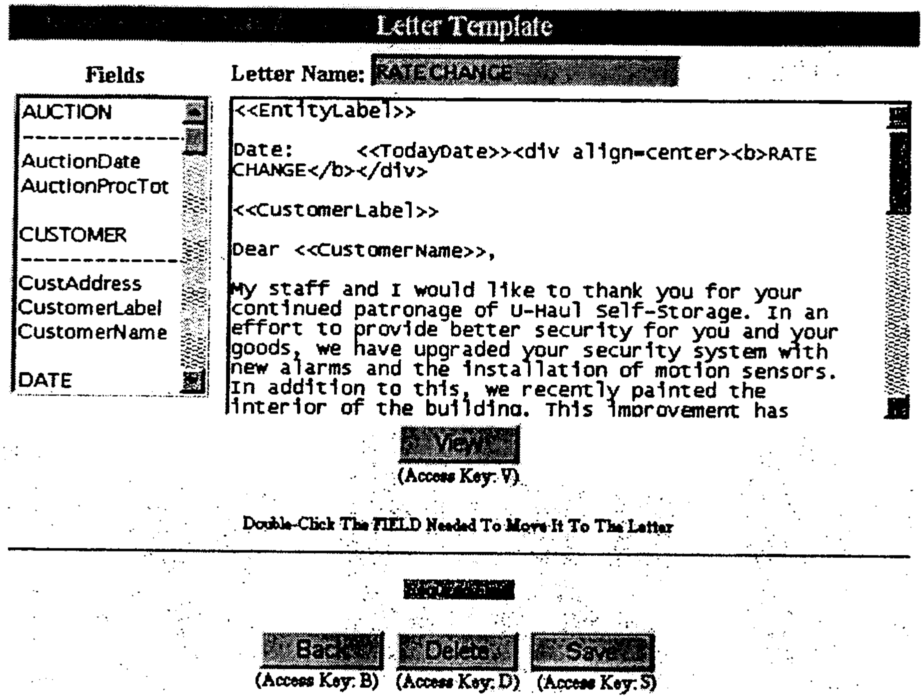
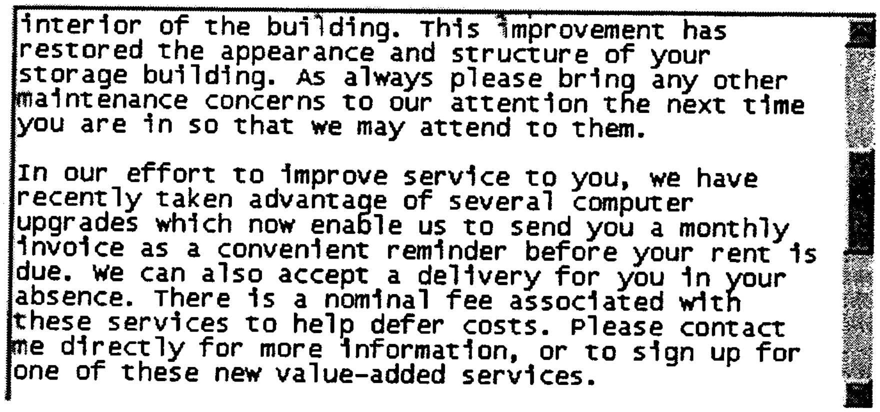
This is a text editing application. Start typing your letter in the larger box on the right. Whenever you need to include information from your database, such as an address, date, rate, room number, etc., scroll down the list on the left. under the title FIELDS. Double-click on the field you want to show. The application adds this information to the letter at the cursor's position.



Notice within the above letter there are items with double angle brackets around them. <<EntityLabel >> These tell the computer to replace the item with the information from your database. These are added by double-clicking on the item found in the list on the left.

The letter can be as long as necessary. The scroll bar on the right provides you with a way to view all parts of the letter. If you need to correct something, simply move the mouse to that position and click.



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me directly for more information, or to sign up for
one of these new value-added services.

We are committed to providing you and your belongings with a better and better product. We believe that this creates more value for you, our customer. Effective <<NewRateEffDate>>, your monthly base rent for storage room #<<RmNumber>> is being changed to <<NewRoomRate>>. The total for your next payment will be <<NextMoNewBal>>.

If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul.

Whenever a letter is generated, the application replaces the double angle bracket areas with the corresponding information from the database.

believe that this creates more value for you, our customer. Effective <<NewRateEffDate>>, your monthly base rent for storage room #<<RmNumber>> is being changed to <<NewRoomRate>>. The total for your next payment will be <<NextMoNewBal>>.

If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul.

Sincerely,

Howard Chase
General Manager
<<EntityName>>

Click here to review information about the different letter template elements.

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Viewing a letter

Here is an example of the final letter. You can view letters as you create them by clicking right below the letter writing area on the LETTER TEMPLATES page.

Letter Preview

Date: 6/18/2001

RATE CHANGE

Dear ,

My staff and I would like to thank you for your continued patronage of U-Haul Self-Storage. In an effort to provide better security for you and your goods, we have upgraded your security system with new alarms and the installation of motion sensors. In addition to this, we recently painted the interior of the building. This improvement has restored the appearance and structure of your storage building. As always please bring any other maintenance concerns to our attention the next time you are in so that we may attend to them.

In our effort to improve service to you, we have recently taken advantage of several computer upgrades which now enable us to send you a monthly invoice as a convenient reminder before your rent is due. We can also accept a delivery for you in your absence. There is a nominal fee associated with these services to help defer costs. Please contact me directly for more information, or to sign up for one of these new value-added services.

We are committed to providing you and your belongings with a better and better product. We believe that this creates more value for you, our customer. Effective 12/30/1899, your monthly base rent for storage room # is being changed to 0. The total for your next payment will be 0.

If you have any questions please do not hesitate to contact me.

Thank you for storing at U-Haul.

Sincerely,

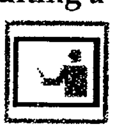
Howard Chase
General Manager

To return to the LETTER TEMPLATES page, click Back

Back
(Access Key: B)

Click Save to save the letter and return to the LETTER MAINTENANCE MENU.

Editing a letter



As you add letters, the LETTER MAINTENANCE MENU page grows, displaying all active letters. To edit an existing letter, double click on the letter's name.

E-256

Maintaining rates

Rental rates are sometimes governed by the economy. If you have enormous competition from other storage facilities in your area, you may want to lower your rates to attract customers away from these competitors. If demand for storage rooms rise, you may want to increase your rates. In additions, you may increase rates because of improvements made to the facility. There are many reasons why a rate changes. Because rental rates are fluid, you need a feature that provides the flexibility to change rates as needed.

To get to the RATES MENU from the HOME PAGE, click on UHI MANAGEMENT MENU. On the UHI MANAGEMENT MENU, click on RATES.

Rates Menu

Set New Rates

Final Approval

Click An Underlined Title To View

[illegible]

(Access Key: B)

Setting new rates

Click on SET NEW RATES on the RATES MENU page displays the FACILITY UTILIZATION page.

Facility Utilization For Entity 990020 By Sizecode

Facility Utilization New Rates Rate Change Reason

Size	Sqft Rm	# Rms	Occ	Vac	% Occ	Curr Rate	Old Rate	Curr Potl Inc	Old Potl Inc	Curr$ per Sqft	Old$ per Sqft	Curr Occ Inc	Old Occ Inc	Occ Inc % Chg
$ 4X4X5 1 I CLI	16	2	0	2	0.00%	$24.95	$0.00	$49.90	$0.00	$1.56	$0.00	$0.00	$0.00	0.00%
$ 4X8X5 1 I CLI	32	0	0	0	0.00%	$42.95	$0.00	$0.00	$0.00	$1.34	$0.00	$0.00	$0.00	0.00%
$ 5X5X7 2 L CLI	25	0	0	0	0.00%	$44.95	$0.00	$0.00	$0.00	$1.80	$0.00	$0.00	$0.00	0.00%
$ 8X8X7 1 L CLI	64	2	1	1	50.00%	$34.95	$0.00	$69.90	$0.00	$0.55	$0.00	$34.95	$0.00	0.00%
$ 8X10X7 1 L CLI	80	4	0	4	0.00%	$44.95	$0.00	$179.80	$0.00	$0.56	$0.00	$0.00	$0.00	0.00%
Summary:	217	8	1	7		$192.75	$0.00	$299.60	$0.00	$5.81	$0.00	$34.95	$0.00	

$ = View Rate History For Sizecode

[illegible]

(Access Key: B)

The FACILITY UTILIZATION page provides you with the following information:

- Different sizecodes associated with your business.
- Square feet for each sizecode.
- Total number of rooms associated with each sizecode.

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Within the REPORT LIST, there is an EXPECTED MOVE OUT REPORT. This lists all customers who have filled in the given a VACATE DATE on the contract.

Expected Move Out Report

Entity: 990020

Date: 6/1/2001

CUSTOMER NAME	ADDRESS		CITY, STATE	PHONE #	RM	BAL
SMITH , FRANKLIN	1922 N. 44TH STREET	10/1/2001	TEMPE , AZ	(480)398-2938	107	$0.00

Back

(Access Key: B)

You can use this report to see how soon a customer plans on vacating an occupied room. You can also use this report to periodically check with your customers to determine if the vacate date is still accurate. All customers' phone numbers are included on this report.

With this information, you can tell prospective renters when a room is expected to be available. Using this information, you potentially can move a new customer in the same day that an old customer is moving out.

Updating reservation rules

Two reservations types can be created within this application.

- A QUOTE is a non-guaranteed contract that provides the customer with the current rate on a particular sizecode. It does not guarantee that a room of this sizecode will be available if the customer decided to rent. No deposit is taken, and the quote remains active for only a short time.
- A CONFIRM is a guaranteed contract that provides the customer with the current rate on a particular sizecode. The customer is guaranteed a room. If a room of this sizecode is not available, the customer is guaranteed a room of a different size. If the room is larger, no additional fee is charge on the first month's rent. If the room is smaller, a refund is provided the customer. A CONFIRM reservation requires collection of a deposit.

Reservation rules control much of the above information.

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How many days after expected move in do you want a reservation to no show?	2

Reservations require an expected move in date from the customer. If the customer does not return, you do not want the reservation to remain in limbo forever. In order to control reservations that are never used, the rule shown above provide the application with a timeframe for retaining CONFIRM reservations.

In the above example, a reservation no shows two days after the expected move in date. If a customer has an expected move in date of June 1st, but does not return by the end of the business day on June 3rd, the reservation no shows.

No shows are created during the closing process.

There is a report available of all no shows in the REPORT LIST.

How many days in the future will you allow a reservation to be made?	30

Enter a future-day limit for reservations. For example, you may not want to take reservations six months in advance. The 30, in the above example, indicates that reservation cannot be taken beyond thirty days (a month) in advance of today's date.

What reservation-confirmation letter is used?	RESERVATIONS

When a reservation is made remotely, once the reservation is directed to your center, a reservation-confirmation letter is created. This notifies you that a reservation was made. It also provides a letter you mail to the customer notifying them that you are aware of the reservation.

To assign a letter to a rule:

1. Click on the down-arrow in the list box.
2. Scroll the list until you find the letter you want to assign.
3. Click on the letter.

Note: Letters are created from another page within UHI MANAGEMENT MENU, click here to see how to set up letters.

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Maintaining Sizecodes

Sizecodes are used to describe and control the different aspects of room inventory.

To access the SIZECODE LIST page:

1. Click on UHI MANAGEMENT from the HOME page.
2. Click on SIZECODES from the UHI MANAGEMENT MENU page.

The SIZECODE LIST page provides you with a list of all sizecodes established at your facility.

Sizecode List For Entity 002510

	SIZE	PROD.	DESCRIPTION		DOOR	BONUS	#RMS	RATE
	5X5X8	CRATE	1 COVERED	NOCLIMATE	SWING		4	$24.95
	5X5X8	SC-10	1 LOWER	CLIMATE	SWING		0	$24.95
	5X5X8	SC-10	1 LOWER	CLIMATE	SWING		0	$34.95
	5X5X10	SC-10	1 LOWER	CLIMATE	SWING		0	$25.95
	5X8X5	LOCKERS	1 COVERED	NOCLIMATE	SWING		0	$34.95

= Edit The Sizecode = Toggle Switch To Activate Or Deactivate A Sizecode.

(Access Key: B) (Access Key: A)

Editing a sizecode

Sizecodes seldom are changed once established. On the outside chance that a sizecode change needs to be made, an editing feature is provided.

To edit an existing sizecode:

1. Click on the picture frame icon next to the sizecode you want to edit.

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